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EDC RC 7.0.0 User Manual

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EDC RC 7.0.0 User Manual

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1 Welcome

1.1 General Introduction

Welcome to DocuData's *EDC* software, the complete solution for your records management business.

The record center version of EDC software was created to manage the operations of an off-site record center. These operations include management of personnel, locations, customer service, customer access to information and inventory, management of circulation of documents within the record center, and automation of invoicing for services and storage fees.

The record center software enables you to ...

- Manage the inventory and operations of a record center, including processing boxes and files, back-up tape rotation service, shredding, and imaging.
- Share accounts with other independent record centers via RIMSLink
- Issue invoices and create various report.
- Provide customers with tools to manage their semi-active and active files, images, electronic documents, and back-up tapes
- Host and manage ActiveWeb

Related products

ActiveWeb enables your customers to manage their own records online. The base license includes:
- Management of box and file inventory
- Order entry
- Reports
- Labels
- User interface customization options

Full-featured licenses include management of:
- Tape rotation schedules
- Active files Inhouse
- Images
- Electronic documents of all sorts.

For an overview, please see our promotional video.

ActiveWeb promotional video

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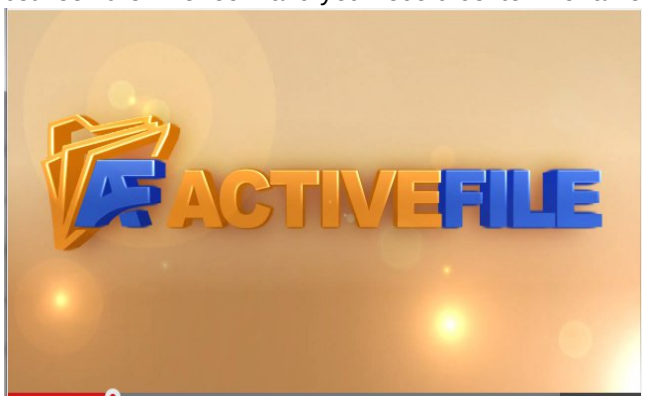
ActiveFile

A customer version of *EDC* called *ActiveFile* (formerly EDC Client) is also available; this software allows your customers to manage all of their physical and electronic documents with seamless integration between their file room and your record center. For an overview, please see our promotional video



ActiveFile Promotional Video

For information, visit our website at www.docudatasoft.ca

1.2 How to use this manual

DocuData encourages and helps you to maintain a current *Operations Manual*. If you require a reminder on how to perform a common task, your own procedures should be your primary reference source. If you are improving an existing procedure or introducing a new service, we encourage you to update your operations manual with your current best practices.

The present manual is useful under the following circumstances:

Updates:

If you have recently updated to the latest version of EDC RC software, please consult the Release Notes 24 section of this manual to help you to explore the changes and new features of your software and understand to take advantage of these in enhancing the service that you offer your customers.

Introducing or enhancing a service:

When introducing a new service at your record center, the Procedures and training 139 section of this manual is a good place to start. Our standard procedures templates are available online. These describe one way of doing things. The procedures section of this manual provides information about more variations. As previously mentioned, you will want to incorporate your new procedures into your operations manual, possibly by taking our procedures template and modifying it for your own needs.

Training a new record center employee:

Any new employee should understand that your own procedures documents (often called Standard Operating Procedures or SOPs) are your primary reference documents. However, if they require a fuller understanding of the capabilities of EDC RC software then you may wish to have them peruse this manual.

Sections

There are several sections in this manual, each with its own purpose.

- The Welcome 20, General Concepts and System Overview 61 sections serve as a general introduction to the manual and the software. The Release notes 24 should be reviewed each time you update to a new official release of EDC RC.

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- Following that, the Setting up section discusses the process of configuring your system for the first time as well as modifying or expanding the services that you offer.
- The Procedures and training manual describes common operating procedures possible with EDC. This serves to introduce concepts in training and can be used in developing your record center's own operations manual, which should be the authoritative reference for procedures in use at your record center.
- Template documents to help you create your own standard procedures are available here on our website.
- The Software reference manual systematically describes the main window and each tab, module, field, and menu option within the software. The first topic for each module is typically an overview, followed by a description of the various fields if applicable, then topics detailing the associated menu options and functionality. These chapters and topics are intended for reference, answering questions such as, "What does this field or function do?".
- An Appendix contains useful reference material such as graphics of different workflows, a list of related EDC applications and a list of activity codes that are useful when creating reports.
- The Glossary defines terms used in the software

Although this manual can be printed, it is best used online.

1.3 Your Operations Manual

Every professional records management facility should maintain a current operations manual which includes both standard practices and special cases.

Some reasons for maintaining an operations manual:

- Consistently deliver your customers what you have sold them, ensuring that nothing is forgotten
- Train new employees as you grow
- Facilitate coordination and exception-handling by promoting consistency between employees and over time.
- Review procedures and discover ways to increase efficiency
- Maintain and even improve your level of service as you grow
- Learn from experience as an organization by documenting new and improved solutions and innovations
- Calmly plan for scenarios that could affect your business. (e.g.. operations manager cannot be reached)
- Achieve various industry certifications

(Note that you should also have a "disaster recovery plan". In addition to its practical value, this is also an important marketing document which many customers may wish to see for reassurance that their documents are in good hands.)

Building your operations manual

During your initial configuration and training, DocuData works with you to develop a work flow that is specific to your needs. Templates for typical operations are available through DocuData's website and more variations on those procedures are described within this manual.

As you streamline your existing services and add new ones such as imaging or shredding container rotation, we recommend finding the relevant SOP templates, reading the relevant section of the procedures manual and changing and adding details for your own companies needs. A good test of the document is to see whether someone unfamiliar with that particular procedure could complete it without assistance. This might require information such as where to find shredding bins, how to handle special clients, etc.

It is good practice to keep an up to date copy of procedures in a place that is easily accessible to your

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employees when they need to use them. This might be on a shared location on your network, or you might choose to store them using ActiveFile's Electronic Document Management (EDM) functionality.

1.4 Conventions

Access path

Navigation instructions appear in **bold font**.To guide you to the correct module, we provide the name of the tab, followed by an arrow,'->', then the name of the module.
E.g. to find the **Management->System Information** module, ensure that you are on the *Management* tab then select the *System Information* module.

Similarly, menu options are specified from the main menu down to sub menus. If an instruction tells you, "From the menu, select **File->View Report->On Type->Department**.", you would find the *File* menu option on the menu bar. The *View Report* menu option would have a sub-menu option *On Type*, which in turn has the option *Department*. This is the option that you are looking for.

If you see the '|' character, it means that you have a choice between the option that appears before it and the option that appears after it. For example, **File->View report|Print report** tells you to go to the *file* menu, and select either the option to *View report*, or to *Print report*.

Keyboard Shortcuts

In procedures described in this manual and in DocuData's Standard Operating Procedures (SOP) template documents, keyboard shortcuts are often given. These are often mentioned in brackets following the instructions for navigating to the function through the menus. For example, "Click on File->Create Order or press the Insert key" might appear in some documents as "**Click on File->Create Order (Ins)**".

Some keyboard shortcuts require multiple keys. To access the functionality of (**Ctrl-X**), you would do as follows:

1. Press and hold the first key, (**Ctrl**) .
2. Press on the second key (**X**).
3. Release keys.

1.5 Quick tour

For a tour of EDCRC's warehouse employee interface, please check out the following video on Navigating in EDCRC.

Note that you may explore all of our videos directly through our YouTube channel, at www.youtube.com/docudata.

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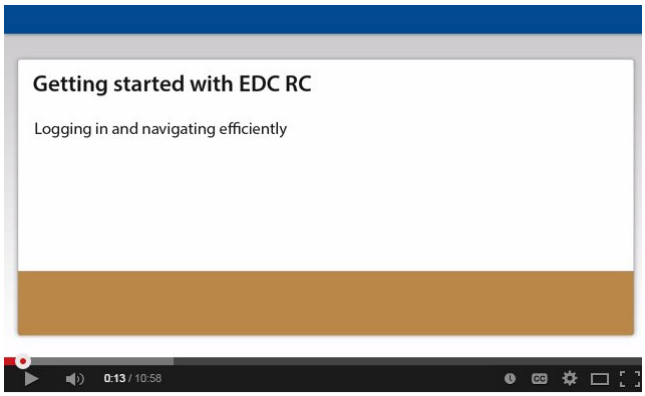

Navigating in EDCRC

2 Release Notes

General comments

Version 7.0 introduces significant improvements to rcMobile[135] and support for on-site and off-site shredding operations. Many of these feature will benefit other aspects of your operations.
Please also feel free to explore the notes on preparing to update[26] and ideas on how to use new features[27]

Changes 6.25.22 to 7.0 (2015 official release)

6.35

11368 Add ability to create Service and Supply customers on the fly when creating an order

To date, most record centers have used a "walk-in account" to track sales and services provided to one-time customers, however, it is useful to keep track of these clients for future campaigns to sell additional services, especially shredding services that can become recurring. Now you can easily search accounts and set up new ones[597] through a streamlined process, collecting only the information that you require as you take the order. The remaining information required for account set-up is taken from your service-only template account[124], making it easy to convert the account to a regular account in the future.

11387 Add history when item picked up with RC Mobile
11373 Adjust commissions csv export to permit selecting a single salesperson

11395 Allow processing standard shred rotation and emptying in rcMobile

11428 Create an automated destruction certificate for on site shred deliveries

11436 Create a customer option for COD (onsite payment) for shredding accounts

11439 Create PDF delivery receipt for rcMobile

11440 Add the advanced customer search interface to the customer information module

11447 Create a new delivery courier type off site shred" and program the associated workflow"

11452 When transferring boxes from one account to another, add the option to reprint box

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labels for the new account at the time when boxes are picked.

11456 Handle off site and on site shred in rcMobile

11459 Add delivery route optimization functionality

11461 Display the route number in the delivery module when a delivery is assigned to a route

11464 Reduce the size of PDF invoices with color logos

11466 Add option to email delivery receipt (delivery receiver, customer delivery confirmation e-mail if not present)

11473 Show warning when editing route from another building

11474 Display driver name label in delivery receipt

6.35.15

11475 Create an on site create visual calendar[644]

11476 Allow the body text of invoice emails to be configurable

11477 Add 'Yes to All' button in confirmation which will automatically choose yes for all boxes from start to end of process-Disposal List

11487 Confirm account and list number when authorizing destruction list. Add authorization date.

11488 Make total taxes and total with taxes available for item details on custom invoice template

11498 Update the PDF libraries used by EDCRC and ActiveWeb

11500 Add file history for file in box tracking

11510 Make an order and delivery slip in EDC when boxes/files are made permanently out when client has boxes at their office through ActiveWeb

11515 Add ability for RC to automatically charge for more than one web license

11526 Give warning if files in boxes not scanned when uploading a PDT return more than once

11534 Warning when an imaged file is added to the cart

11641 Remove header images from ActiveWeb

11545 Add customer option to show the number of containers currently on-site on the delivery slip[261]

11546 Add option to send file out listing with electronic invoice

11547 Improvements to batch addition of files in EDC RC

11548 Improve interfiling with an interfile label

11567 Allow creating recurring orders in advance

11569 Send email to supervisor if Pervasive license validation on the server fails.

11573 Make default selection of Scheduled" and "Next trip" check boxes in delivery creation smarter"

11582 Add route creation for on site/off site shred deliveries

11583 Adjust H13 display to permit display of larger box counts on processing list screen

11585 Hide storage range on invoice if customer does not have inventory

11587 Add option to zip Invoice files when sending invoices by email

11596 Add ability to copy label definitions to other customer or all customers

11599 Use TLS 1.2 when available instead of SSL 3.0 - which can still be used if it is not.

11604 Use EPayment integrator library for credit card payments

11609 Allow user to choose driver when creating route from the shredding calendar[644]

11610 Allow editing shred calendars[644] from route module

11611 Allow creating recurring orders automatically advance when creating route from shred calendar[644]

11613 Add ability to optimize route from shredding calendar and include

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driving time

11628 Create shred containers on-the-fly" if they are not in the database"

11629 Add the delivery receiver name on the delivery receipt
11579 Increase amount of characters in extension in Delivery Address Module
11494 Make ActiveWeb Mobile Recognize the Prefix Type When Checking In or Out Location

7.00

10654 Add ability to export to CSV web license report in EDC RC
11698 Display Special Instructions in rcMobile
11624 Display item counts in Delivery Menu

Shredding:

11581 Change the picking of bin rotations in rcMobile to be done a customer site
11635 Add truck validation for Shredding Containers for a Route
11679 Create reports for shred bins to be picked
11695 Adjust invoice for shredding to show delivery number and credit card authorization number
11701 In rcMobile when delivery is COD, the user has to see that in advance before the payment step
11700 Destruction certificates must show emptyings and rotations
11709 Add ability to overlap deliveries on shred calendar
11708 Add new system information level opening hours for shredding only
11711 Only allow one employee at a time to use the shred calendar in Edit mode
11715 Prevent moving a delivery in the shred calendar if the delivery is on a route
11710 When adding shred order using calendar, show visual indicator in calendar if a route is created for that day
11722 Highlight days in different shading or add divider in shred calendar

2.1 Preparing to update

DocuData releases an official release each year. This update is included in your support and maintenance agreement. Record centers are encouraged to stay reasonably up to date in order to take advantage of new features as well as improvements to existing ones.

Possible steps to include in your update checklist:

1. Watch for the announcement of the new release on the EDCRC users discussion group. This usually happens in the spring.
2. Upon receiving the announcement, contact support@docudatasoft.com to schedule a time and download the update package.
3. Download the update package. Having this ready in advance will save time.
4. If you wish to test the update in your test environment, you may do so. This obviously requires that you have a test environment.
5. Alert your clients that you will be down for a brief period for scheduled maintenance.
6. Before deploying the update to ActiveWeb, you may wish to alert your clients. Note that ActiveWeb does not generally need to be updated immediately upon updating EDCRC.
7. Before running the update, review the release notes (Release Notes 24), including earlier release notes 32 if you are updating from an older version than the previous official release.
8. Make sure that your employees are prepared for anything that will affect them.
9. Make sure that you are ready to update your PDTs (all lists have been uploaded back to the system)
10. Have support@docudatasoft.com run your update at the scheduled time.
11. Deploy the new version of rcMobile
12. Update your legacy PDTs between the time that you last use them with the old version and first use

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them with the new one.
13. Enjoy the new features!

2.2 Ideas on how to use new features

This topic is provided as a fairly informal discussion of some of the new features. For a systemic list of new features with links to more details in the manual, see the release notes[24]

rcMobile

Starting with version 7.0, all record centers that have a web server should seriously consider using rcMobile. Using rcMobile to prepare, perform, and return your deliveries will give you much greater efficiency and tracking than delivery with the old PDT did. You can collect confirmations from the users and provide live or nearly live status updates depending on whether or not you have a data connection on your mobile devices in the area that your drivers are servicing. You can e-mail receipts instantaneously, meeting strict requirements that some clients have for tracking the chain of custody of items. You can also immediately know if there is a problem with an item, and for purge shredding you can collect payments by credit card at the time of service, after updating the service to ensure that you bill for the work that you did rather than what was initially quoted (as people typically have more work for you to do than originally anticipated.)

Deploying rcMobile[135] is very easy. Simply click through the wizard, then you can access rcMobile as a web site, with the same SSL encryption, DMZ, and other security features that protect your ActiveWeb installation.
Your drivers will access the application using web browsers on work stations that have internet access or on mobile devices that have data plans and an HTML5-compliant browser (such as Chrome on an Android device).

Note: Since your employees would access the system using their employee login and password information, you might want to review your password policies for employees, requiring them to change every 90 days. Use the Expiration field in the Management->Employee[339] module. With more sophisticated systems, you might also be able to control which devices and IP addresses people are able to access rcMobile from. This would require a conversation with your IT support team.

Testing rcMobile:
Even before you have mobile devices for accessing rcMobile, I would recommend testing it out on a regular workstation. If you have a USB bar code scanner, you test out all of the functionality.

With regards to mobile devices, there is a wide array available. Some record centers have reported acceptable results using rcMobile directly on their personal Android smart phones using a bar code scanner keyboard application to scan bar codes with their phones' built-in scanners. At the other end of the scale, the best results were achieved for high-volume scanning using a top-of-the line Motorola device with a built-in bar code scanner and an outstanding battery life even while running various other applications including push-and-talk communication at the same time. DocuData would be happy to provide the results of our experience, but it is up to you to select the models best suited to your needs and budget.

Cash and credit card payments for purge shredding:
Now that rcMobile permits multiple payment options on the road for service-only accounts, you will want to consider what options your business wishes to offer. Note that credit card information is not actually processed by rcMobile, but instead passes control to a credit cart payment gateway of you choice. If you wish to process credit cards then you will need to set up an account with a provider from the extensive list available as gateways at the bottom of the management->System Information module. This

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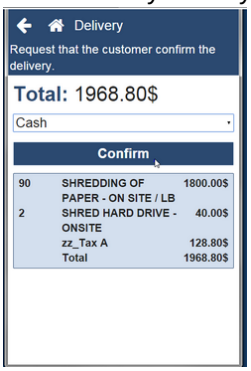
will also likely affect your choice of mobile devices, since some have built-in credit card readers.



Emailing return slips, receipts, and shredding certificates.

For on site shredding, you can send the certificate of destruction upon completion of the work, along with an invoice or receipt if the job was Cash on Delivery (C.O.D.).

For records management accounts, the ability to immediately issue a receipt for the boxes that you take into custody could be a good selling point for clients that require this, replacing the use of the old receipt printers that some record centers used. Run this by your clients, and see what they think!

Transport containers and shredding bin tracking

Both transport containers and shredding bins are now individually tracked with a detailed history of their activity. If you have not already done so with previous versions, this is a great time to bar code your record centers own items so that you can see what happened if things get damaged or go missing. With rcMobile, the work flow for working with these items becomes much more convenient, streamlined, and therefore reliable. You might also want to take advantage of the file packaging methods that rcMobile introduced several versions ago.

Packaging files and tapes with rcMobile 218 can start as soon as the deliveries are create and closed. This is typically done by warehouse staff instead of by drivers, making it much easier for drivers to load their truck - confirming their content, and to scan items to the client as they are delivering them.

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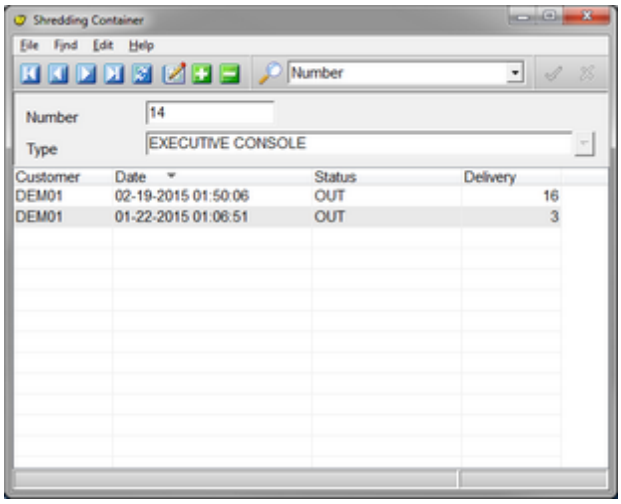


Delivery routes

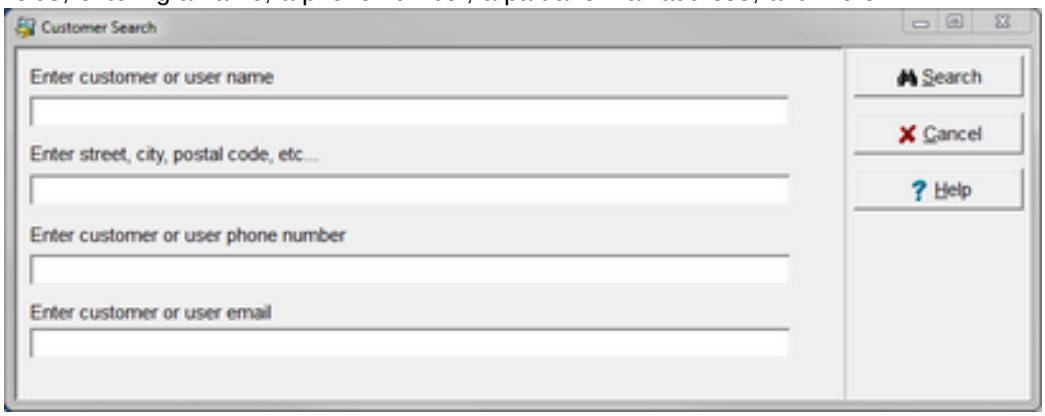
EDCRC's delivery route module is an essential tool for ensuring that your record operates systematically and efficiently. Using route templates to add deliveries to your routes and put them in the correct order and using EDCRC's route optimization tool, setting up your delivery routes takes minimal time and gives you huge advantages.

If you are not already familiar with the tools for managing routes and route templates, take a look at the following topic.
Managing route templates[674] and Overview (Delivery Route)[639]

With the rcMobile workflow, packaging of files and tapes into transport containers with rcMobile[218] can start as soon as the the deliveries have been created. This step makes

Customer search and rapid service and supply account set-up:

These features are so useful and intuitive that you will be able to use them with very little explanation once they are configured and you will quickly forget that they are new. Working with more customers that you have less of a history with makes it important to be able to find an account if it exists much more easily. The new search runs extremely quickly. You can to partial text search across multiple fields, entering a name, a phone number, a partial e-mail address, and more.



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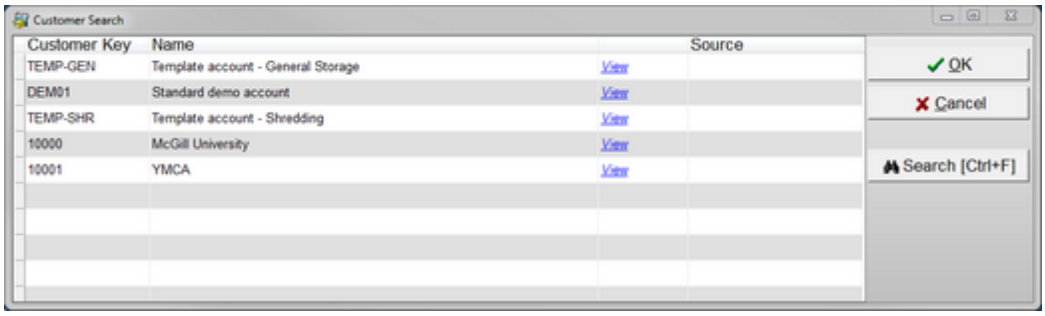
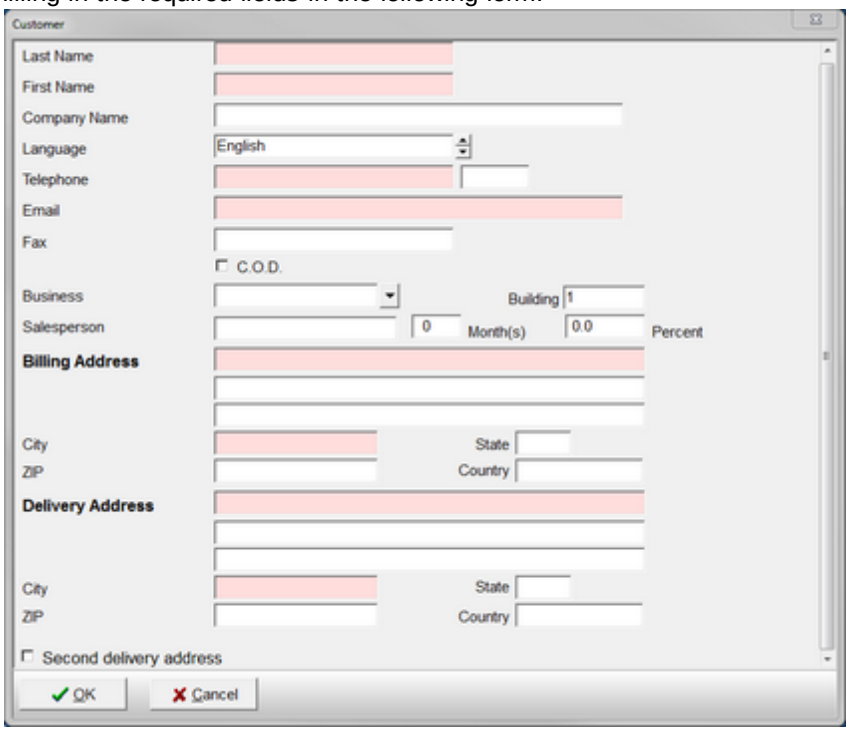


If you establish that an account does not exist, you can set it up without leaving the order module, by filling in the required fields in the following form.



Scheduling shredding service

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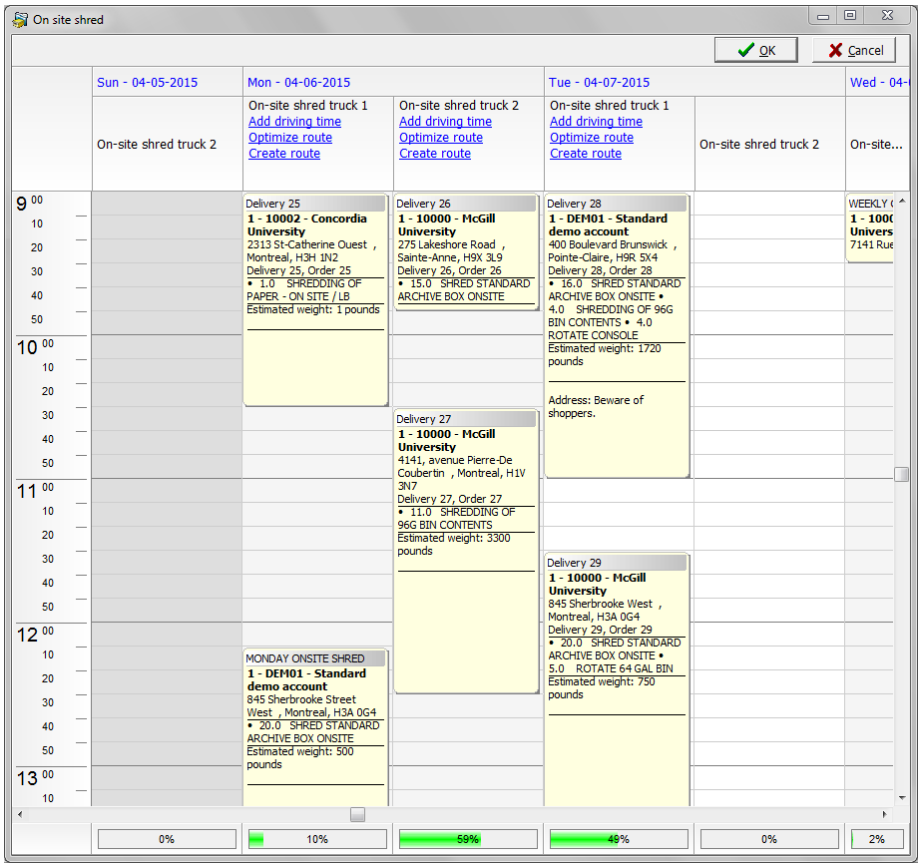
On site shred
OK
Cancel
Sun - 04-05-2015
Mon - 04-06-2015
Tue - 04-07-2015
Wed - 04-
On-site shred truck 2
On-site shred truck 1
Add driving time
Optimize route
Create route
On-site shred truck 2
Add driving time
Optimize route
Create route
On-site shred truck 1
Add driving time
Optimize route
Create route
On-site shred truck 2
On-site...
Delivery 25
1 - 10002 - Concordia University
2313 St-Catherine Ouest , Montreal, H3H 1N2
Delivery 25, Order 25
• 1.0 SHREDDING OF PAPER - ON SITE / LB
Estimated weight: 1 pounds
Delivery 26
1 - 10000 - McGill University
275 Lakeshore Road , Sainte-Anne, H9X 3L9
Delivery 26, Order 26
• 15.0 SHRED STANDARD ARCHIVE BOX ONSITE
Delivery 28
1 - DEM01 - Standard demo account
400 Boulevard Brunswick , Pointe-Claire, H9R 5X4
Delivery 28, Order 28
• 16.0 SHRED STANDARD ARCHIVE BOX ONSITE • 4.0 SHREDDING OF 96G BIN CONTENTS • 4.0 ROTATE CONSOLE
Estimated weight: 1720 pounds
Address: Beware of shoppers.
Delivery 27
1 - 10000 - McGill University
4141, avenue Pierre-De Coubertin , Montreal, H1V 3N7
Delivery 27, Order 27
• 11.0 SHREDDING OF 96G BIN CONTENTS
Estimated weight: 3300 pounds
Delivery 29
1 - 10000 - McGill University
845 Sherbrooke West , Montreal, H3A 0G4
Delivery 29, Order 29
• 20.0 SHRED STANDARD ARCHIVE BOX ONSITE • 5.0 ROTATE 64 GAL BIN
Estimated weight: 750 pounds
MONDAY ONSITE SHRED
1 - DEM01 - Standard demo account
845 Sherbrooke Street West , Montreal, H3A 0G4
• 20.0 SHRED STANDARD ARCHIVE BOX ONSITE
Estimated weight: 500 pounds
0%
10%
59%
49%
0%
2%

If you are providing shredding service, then you will appreciate the ability to manage these routes visually through a calendar.

The calendar is available through different modules but with different functionality based on the roles of the employees who would access it.

Order entry personnel can view the calendar to see the location and capacity of vehicles and stops for each day, and they can place a new stop on the calendar. However only people with access to the delivery maintenance and delivery route modules can adjust the schedule for orders that have already been placed.

Please watch the videos to get a better idea of how this words.

Invoice e-mails

First, you will likely want to take advantage of the ability to add text to the body of your invoice e-mail.

Follow the instructions for modifying terms used in EDCRC[361] to customize the text that will appear in the body of your invoice e-mails.

Next, if you have been having problems with customers reporting that they cannot open invoice attachments, it is worth checking again. DocuData has replaced the PDF library that we were using, so it is possible that Exchange servers will let these through more consistently now.

If they still have problems, you can try using the customer option to zip the e-mail attachments. Please let us know how it goes!

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3 Release notes for previous releases

3.1 Changes 5.50 to 5.56 (2010 Official Release)

5.50

8813 Add ability to login in ActiveWeb using email address[304] in addition to login name.

This feature does not require any additional configuration, and is useful for users that log in less frequently and have difficulty keeping track of many logins and passwords.
Simply notify your customers that they may use the e-mail address associated with their profile instead of their login if they wish. Note that if multiple profiles for the same account use the same e-mail address, this feature will only work for the first profile.

8816 Add ability to have read-only box and file numbers[260] when using automatic numbers

Activate this setting in the customer information module if the box number should always match the RC number for this customer. This is an enhancement to the recently-added Automatic Box and File number options, which save time if your customers do not use their own box and file numbering systems.

8913 Add option to allow disabling the "Box Sale"[262] menu item from the order module in EDC RC and in ActiveWeb.

By default, the standard box sale price code (1.2) is available on the orders tab in EDC RC and in RC web through two paths - both as a line-item, and also as a special "box sale". However, if you offer multiple types of boxes for sale, you may not wish to have your customers use this second option. In this case, use the "Hide Box Sale" setting in customer information. (Note: if you have many customers and wish to update this setting for all customers, you may contact support@docudatasoft.com to do the change in one step rather than editing each customer individually.)

8923 Add specific days only options[725] to regular delivery types.

Use this feature to create new regular delivery types that will be limited to specific weekdays - for example, if you only do a specific route on Tuesdays, you could make a delivery type for this available to the customers on that route, and any regular orders with this delivery type will automatically be scheduled for the next available Tuesday.

8898 Allow once a day delivery cycle with same day delivery[372]

This feature is primarily of interest to new record centers during their initial set-up. If you are reconfiguring your picking and delivery times and think that this feature might be of use to you, please contact support@docudatasoft.com to help you thoroughly analyze the impact of proposed changes.

8824 Add the ability to charge a Trip charge price code for a delivery address[331]

If a trip charge is added to a delivery address, this charge will be added to regular delivery charges once for each delivery to this address where the ship mode of the delivery type is record center. (i.e, not fax, imaging, or external courier).

8963 Add a customer option to always hide the alternate label[262] field in ActiveWeb.
8974 Add a function to "Associate to multiple customers" the Box and File field definitions[288].

This feature simplifies the process of setting up an existing customer to use ActiveWeb based on

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previously configured customers.

8896 Add interface to be able to mark process errors as corrected

There is now a friendly interface for helping you to ensure that all process error are taken care of. Use of this interface should be included as part of daily operations. See Reconciling process errors 673

9001 Add the Box userfield1 to the ActiveWeb order confirmation for boxes and files.
9002 Add the Box userfield1 to the delivery slips and return slips.
9009 Add the Box userfield1 to the ActiveWeb order confirmation for auto inventoried files.
5208 Ability to view and terminate ActiveWeb/ActiveWeb sessions

It is now easy to view a list of active web sessions, and if necessary, terminate them. This is very useful if you wish to perform maintenance during the day and do not want to affect any customers, and is also useful if a customer has users that are unable to access the web because all of their licenses are in use. To manage active web sessions 244 the Internal LAN RPC server setting must be completed in the replication setting of the Management->System Information module.

8850 Add filter to include customers with web licenses in the customer search form 490

The customer search form is used in operations such as generating mailing lists or applying rate increases. Now you have the option of easily identifying customers with web licenses.

9045 Add ability to display the alternate locations on the PDT 764

This feature is very useful if you are converting from one location addressing scheme to another. On the PDT, simply go into the (4-Utilities) menu and press 5 to access the option to toggle between displaying the different location labels. If no alternate location label exists, the PDT will display the EDC location even with this option turned on.

5.51

8912 Add the ability to apply a file accession price 729 for files in box.

Now it is possible to charge a different fee for filing a new bar coded file (as opposed to a returning file) into a box. This provides a useful mechanism for processing, tracking, and billing for inter-files as well.

8812 Add ability to apply the tax based on the billing building 355 that the client belongs to.

This is useful if you have customers that are affected by different municipal taxes. (Note that you will have to run invoicing for each billing building)

8811 Add ability to have global, customer and individual invoice notes.

This exciting new feature enables you to communicate additional information to your customers more easily through their invoices. Notes appear near the end of the invoice in a text box that will expand to include the specified text.

- Global: Appear for all customers (though you may turn them of per invoice)
- Customer: Appear on all invoices for a given customer unless turned off.
- Individual invoice note: Only appear on the specified invoice.

8809 Add ability to search by business type in the customer search form 490
8899 Add accounting key by departmental invoice 754 when exporting invoice data

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8926 Ability to enter a class for export to QuickBooks at the customer level[255] .
8950 When adding new customers using "copy and add[279] ", the copy options should be remembered
8999 Allow adding orders with only returns and line items as pick and run
9017 Allow searching by alternate location[524] in the Location module.

5.52

8766 Accept DELETED items that are returned to the record center

When a customer marks a box as permanently out, future storage charges are canceled, however, the box still exists. Due to customer needs, EDC has been modified so that "Deleted" boxes can be accepted back into inventory. Storage charges are automatically reinstated.

8693 ActiveWeb: Add a Start Date range filter in the Advanced search options.
9065 For Invoices sent by e-mail, add a system-wide BCC e-mail address and a reply to address[374].

Filling out these fields is important if you send invoices by e-mail. The reply-to address will receive any out-of-office replies and delivery failure notices, and the BCC of the e-mail allows you to confirm that the e-mail was sent

9070 Add user option "Don't ask for password at RC[304] "
8815 Add ability to indicate the capacity on location bar codes.

If you would like to have the capacity on any location labels newly printed through EDC, consider modifying your location label template[382] to include this field.

8881 Add customer option to automatically produce a list of authorized users[265] when sending invoices.
9011 Add a customer option to remove the "quantity shipped" and "quantity returned"[256] from the return slip and the delivery slip.

Setting this option to Yes is generally considered to be a good idea, especially if you automatically e-mail delivery and return slips, and if your customers are not billed using the "Container" courier billing method.

8546 Add option to specify delivery type[370] for destruction and perm-out billing and box schedule orders.

Note: while this change improves the transparency of EDC RC without affecting functionality, you will have to complete these fields in the system information module in order to make any other changes in this module. If you have any doubts, check which delivery types were used on prior tape rotations and disposal orders, and use the same one.

8955 Improve workflow for Fax deliveries[178] to use Imaging on demand module

Fax deliveries are now performed by a method that is consistent with the methods for imaging on demand. Open the Orders->Imaging on demand module to specify the number of pages to bill for. Also note the related change: It is now possible to specify a fax number for an authorized user, and this number will appear on delivery slips for fax deliveries. These two features may help you to greatly streamline fax delivery processing.

9091 Add a customer option for disposal mode integrity[257] .

It is now possible to bypass the disposal date and type integrity options for specified customers.

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9100 The Create By-Pallet List from the Disposal[545] and Transfer[557] modules should indicate the quantity on the list.
9089 Add "automatic" container billing option (obsolete in 6.00+)

The container courier billing method requires an employee to manually enter the quantity of items shipped. This step can be vulnerable to errors which will directly affect the customer invoice. This new feature allows you to skip the manual entry by specifying the number of files that can fit into a container. (Boxes are treated as one container.)

9116 Allow specifying return price code for item and container courier billing in delivery type[724]

For customers that are billed by item or by container it is now possible to specify different price codes for outgoing versus incoming delivery handling. This can be used to provide your customers with additional information on their invoices.

352 Allow deleting images after they are saved[444]
9117 Add ability to automatically charge web access fee[255]

Consider using this feature for billing for web licenses instead of using periodic invoice items if you would like EDC to adjust web license fees based on either (1) the number of licenses, or (2) the number of inventoried items (boxes and/or files and/or images). The charge is per month and appears on the service invoice.

9104 Add import option "replace notes instead of appending[432]"
9124 Add customer option, Data capture before accession[258]

This great new feature will allow you to send an e-mail to address specified per customer account listing any boxes not yet modified by data entry at the time that it first arrives at the record center. Note that this feature presently sends an e-mail to the delivery supervisor e-mail address as well as the authorized user associated with the first order on the delivery. For some customers this may not be ideal, so this functionality will be refined in an upcoming release.

9137 Add customer option to hide invoice lines with zero cost[252]
9107 Implement file to search for existing inventoried files when not found

Now, if a customer requests a file that has previously been added to a box in inventory, the file-pick to search fee will also be applied for unsuccessful searches for these files if the file to search conversion option[258] is turned on for the customer.

9110 Allow users to import data from the web

To allow your customers to import data on the web, add an import description file for them to select from, near the top of the customer information module.

9223 Add ability to resize an IN box with a "special" move list

If boxes have been assigned the wrong size, you can now easily correct this by performing a regular move on a PDT to a location of the correct size, and uploading the result in the Maintenance->Box and File Maintenance module, to the File->Upload resize move list[442] menu option.
Similarly, if items need to be transferred between vault and regular storage locations, a feature was added in the previous release for moving items between regular storage and vault[441] with a move.

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9262 Don't send multiple order confirmation emails[248] to delivery supervisor

If the e-mail address for the authorized users who placed the orders is the same as the one for the master delivery slip, EDC will only send the master delivery slip and not the confirmation of shipment of the individual orders to this address. (If you are not already using the e-mail delivery / return slip options, this might be something of value to your customers.)

5.54

9176 Printing of delivery slips in order of delivery route

For record centers with many deliveries per day, this new feature may save significant time. Consider modifying your procedures as follows:

- When performing delivery creation, deselect the option to print delivery slips[627] in the delivery creation module. Any deliveries that cannot go on routes will still be printed.
- After creating your routes in the delivery route module, for each route, use the File->Print delivery slips of route[643] menu option to print the delivery slips for the route in the correct order.

9251 Add ability to export user rights report in CSV format[308]

This feature is very useful for helping customers to manage the access rights of their users. The CSV format is designed to be used in a spreadsheet so that users can apply filters to the data and quickly determine who has access to

9349 Show user fax number[305] on delivery slip

For users that request fax delivery service, it would be worth filling in this new data field, as it will save the labor of looking this information up.

9350 In order module display and allow editing " Perm Outs[616] " request after item is added to order
9352 Create a report to list the recurring orders[681] schedules for a customer.
9399 Compute destruction credits based on box withdrawal dates instead of the destruction list

Since large withdrawal lists may take considerable time to process, this change ensures that customers are credited for storage space that is liberated as each pallet is processed, rather than waiting for the whole list to be completed.

9131 Add the ability to specify the number of boxes, files, and tapes to pickup from the customer[605]

When placing an order to have unspecified items picked up, users can now separately specify the number of boxes, files, and tapes, instead of just the number of items. This appears on the delivery slip, and in the delivery routes module for route planning purposes. (This change is for reference purposes and does not affect billing in any way.)

2770 Create Highwater storage[252] billing option

Consider this billing option if you wish to bill in arrears for the maximum number of items that were in storage over the billing period for a customer.

9531 Log ActiveWeb sessions in access log table[362]

Web login events by authorized users are now visible in the Access Log table. Being able to see what login was used and when can be useful for tracking purposes.

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5.55

9450 Create stored procedures to get notes[511] and bar codes[511] in reports

For advanced users, these enhancements will enable you to add multi-line notes fields to reports and will greatly facilitate the creation of custom reports for printing box, file, and compact tape labels. On the data tab of report builder, you would add a calculation with an expression such as "GetBoxBarcode36(CustNo, BoxDDNo)". More details and additional stored procedures are listed in the reference manual[511].

9468 Add information on authorized users CSV export

A function was added to the authorized users module to make it easier for record centers to help their customers to periodically review their list of authorized users and their access rights. (Customer->Authorized User, File->Export User Rights to CSV).

9470 Add methods to Edit Perm Outs[616] and Edit Recipients[616] for an order.

These new functions simplify the process of correcting errors made while the order was being placed.

9191 Add customer option to show end of rotation delivery slip reminder[261]

Tape customers will frequently create their tape rotation schedules for several years in advance. This new feature protects the customer against inadvertently failing to add new delivery dates when the schedule runs out, by placing a warning on the delivery slip for the tape in question. By default, this option is turned on.

9256 Allow "non-pickable" order **items, and have such orders, group, close, and verify automatically**

This is a significant enhancement to the work-flow in EDC. In general pricing[737], review all line-item price codes. If they are not items that require picking, mark them as such. This will make it easy for you to automatically create deliveries for the purpose of capturing charges. You may also modify your "record center work" delivery type to reflect these changes (make the ship mode by time, so that it will print out immediately upon order creation). You will also want to update your operations manual and train your staff on the simplified procedures.

9490 Add ability to save query timeout settings per report[507]

Complex reports may take a long time to run, especially at record centers with a lot of inventory. This option enables you to modify and save the query time-out for specific reports that you allow to take a long time to run. (Prior to this change, the setting could be altered but the change was not saved.)

9534 Allow billing for EDM storage

With the appropriate web license, customers may manage and store electronic documents on your server. The price code to modify for this is ISTR, which now captures both image and document storage charges, in MB/year. You may wish to rename this price code to reflect this if you offer electronic document storage.

9538 Do not apply the trip charge and the gas surcharge prices when all items on a delivery are excluded.

If all items on a delivery are excluded during picking and there are no returning items or line items, the

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trip charge and fuel surcharge is not applied, and the delivery is marked as Verified during delivery creation.

9576 Make font for special instructions on delivery slip bold

Special instructions appear near the bottom of delivery slips. However, so does other information such as notes associated with delivery address, which drivers might learn to ignore. Having the special instructions in bold make them stand out for the driver.

9139 - An interesting new feature will e-mail your customer and log an entry in the process errors report if the customer sends you a new box for accession that has not yet been modified by data entry - whether through ActiveWeb, a data import, or directly in EDC RC. See **Customer->Customer Information**[258], Data capture before accession[258]. Be aware that at present, this feature will e-mail to the same address that delivery addresses are sent to, as well as the authorized user for the first order on the delivery. In a future release, a new e-mail field added to the customer information module for this purpose will be used instead.

3.2 Changes 5.56 to 5.70 (2011 Official Release)

5.56

9763 Add option to copy shredding bin associations when creating an new account using copy and add[279].

When creating a new customer account by copying from an existing account, the list of options that can be copied from the source account now includes "shredding bins".

Usage example: If your source account has rotation service for shredding consoles as their only shredding service and your new account does as well, then you could check the "shredding bin" option.

(Shredding bin associations can be accessed through the customer information module window by clicking the dropdown box in edit mode. This determines which shredding bins the customer can place shredding emptying or rotation orders for.)

9760 Add customer option[265] to include a full inventory listing as an invoice e-mail attachment

This option appears in customer information along with the other invoice attachment options. The spreadsheet includes all fields, and is compressed. It is only included with invoices sent by e-mail.

The same zipped file can also be created by running File->Export All Boxes from the Customer->Customer Information module.

9828 Add option in fields update to change disposal to variable

A new checkbox called "Unlock disposal values"[424] has been added to the box and file field update form.
Disposal will be recomputed based on the record series when "Unlock disposal values" is checked during the batch update.

9858 Increased maximum alternate barcode length to 30 characters for boxes and files
9872 Increase maximum length for transit locations from 15 to 80 characters

9840 Make ActiveWeb login message for locked accounts RC modifiable

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With this change, users logging in with valid credentials to a locked account receive the message, "Your account is locked. Please contact your account manager. ". This is dictionary string 5477, and can be modified[89] to include contact information specific to your record center.

9871 Change the Rimslink names for "Master" and "Slave" to "Contract holder" and "Subcontractor".

These names have been changed. Functionality is not affected.

9090 Clicking the + button in the Customer Information module brings up an option to "Copy and Add"[279], rather than immediately creating a blank account.

Clicking the '+' button in the customer information module now brings up a dialogue box asking whether the user would like to create the new account based on the currently displayed account, or to create a blank account based on the default settings in the system information module.

(Using existing accounts as templates in creating new accounts is now the preferred method at most record centers, since the copy-and-add functionality provides the option of copying many settings that may be common.)

9926 Add ability to import inhouse boxes and files with location assignment

Now it is possible to import boxes and files to the in_inhouse, out_inhouse, destroyed_inhouse states. These states apply to customers who are using the circulation module in ActiveWeb to manage their boxes and files at their own site.

To import items to this status, include a column with the value in_inhouse, out_inhouse, or destroyed_inhouse in the spreadsheet.

If the activity is In_Inhouse or Out_Inhouse, a location needs to be supplied.

When an inhouse box or file is imported and the specified location does not yet exist in the system, the location is created, then the item. When box locations are created in this manner, they are created with a very high capacity.

Locations can also be explicitly set up by import[818].

9932 Display the count of box and file retrievals[590] on an order in order module

When an order is placed, EDC now displays the total number of boxes/tapes and files on the outgoing order.
This information appears in the right column of the order header, below the delivery date field.

9942 Add mouse keypad interface when entering delivery number after OCR error in delivery imaging

Because some twain drivers block keyboard keys, a keypad[666] has been added to the Orders->Delivery Imaging module so that the mouse can be used to correct the delivery number if the slip is not recognized during OCR.

9945 Ask the user before scanning/importing images[636] if the batch has separator pages

When images are scanned or imported into files in EDC, EDC performs OCR to detect document separator pages.
Users now have the option of not performing this OCR. This option will significantly increase the import

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speed. This applies both to imaging on demand[636] as well as to batch imports[440] through the Maintenance->Box and File Maintenance module.

9952 Add kiosk mode for in-house circulation in ActiveWeb.

The Kiosk mode was added to ActiveWeb to allow customers with Active items to have their recipients checkout records from their local file room without a file room employee present.

The interface is part of the ActiveWeb package and can be accessed by using the url of your ActiveWeb installation followed by /terminal.

To access the kiosk a user must login. The rights[313] requirements are that the user has edit rights on the circulation module and that the customer has a license that includes active items. This login does not use a license.

Because history items will be attributed to the user logged in, it is good practice to create a user dedicated to this purpose (something like "Terminal" or "Kiosk")

The session should will not timeout, but doing a refresh or browsing to another page will close the session like it does for ActiveWeb.

9992 Rename Retention Schedule module to Record Series

The terms retention schedule and document type have been changed to Record Series in EDC, to reflect industry standard terms.

9957 Add ability to have multiple web license per customer

Now it is possible to have multiple web licenses with different options available for the same customer. To add an additional license type you would use the "Add" button through the Customer->Customer Information, Edit->Generate Web Licenses[281] interface.

To associate web license types to authorized users:

- Open the Customer->Authorized User module
- From the menu, select Edit->Web Licenses
- Select the customer. A list of users and their associated licenses appears
- Select the users that you wish to assign a specific license type
- Click the "Change license of selected users" button
- Select the license to assign
- Click "Close" when done.

The user will now have access to the specified functionality when they log in with these credentials.

9985 Have recurring orders automatically verify if they don't contain pickable items

Add feature to automatically close and verify the order and delivery created by a recurring order if all the items of the recurring order are marked as not pickable. This would be very helpful for automatically scheduling charges and having the schedule end at specific dates[877] .

10034 Remove requirement that a customer have a tape web license to create rotation schedules at the record center

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EDC no longer requires accounts to have a web license in order for the record center to have access to the rotation schedule functionality through the record center interface.

10029 Ability to modify the "for" 544 field of a disposal list after its been locked

It is now possible to modify the "for" field to put the name of the person who signed off the list even after it has been printed.

This is useful because record centers may create many preliminary disposal lists at once using the Multi-client auto create feature and only find out who has signed for a list when it returns.

10073 Add delivery calendar report and ability to send it with invoices

EDC now has a calendar utility for displaying dates on which deliveries are scheduled or have occurred, for a customer, over a date range for some or all delivery addresses and some or all delivery types.

The report is accessible through the Orders->Delivery module, by selecting File->Delivery Calendar 630 from the menu. Customer holidays are also indicated on the calendar.

This report can be automatically included as an invoice attachment for a customer by navigating to the correct account in the Customer->Customer Information module, and under the Invoicing section, setting the "Delivery Calendar 265 " setting to "Yes".

10104 And import option suppress warning for dates > 3999/12/31 on imports

When importing customer box and file data, a warning is logged if dates are greater than 3999/12/31. For large imports where this is expected, this can clutter the import log.

A new option as been added to skip this warning. The option used in the description file 785 is *skipinvaliddatewarning

It has also been added to the import wizard 437.

10117 Add Field 1 to ActiveWeb advanced search filters and order confirmation slip

In ActiveWeb it is now possible to filter search results based on users' Field 1,2, and 3. Field 1 is also included in the order confirmation slip that indicates whether items were accepted or rejected on web orders.

10126 Add ability to override delivery cycle by customer

In the customer->customer information module under in the "Pick up" section, it is possible to set a specific account to have deliveries once a day, twice a day, or to use the default setting for the record centre 265 .

This provides greater flexibility if you have customers with special contract that require a delivery schedule different from that of typical customers.

10134 Problem with Remember me option fixed on IExplorer and Firefox on Activeweb

A problem where the "remember me" option for ActiveWeb was not working with certain browsers has been fixed. It had to do with how they were handling cookies.

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10125 On ActiveWeb, convert "Filters Active" message into "Clear Filters" button

Advanced filters in ActiveWeb allow users to limit their search results.
Clicking the "Filters Active: X" warning button now clears these filters.

10083 Add user defined invoice templates and sub-account invoicing

1)- Record centers now have the option of using the current "legacy" invoice or applying a customizable report template[710]. To use this for a customer, set the "Legacy invoice" setting in the customer information module to "No", then modify the template.

This can be done at 3 levels:
1- For the record center as a whole: Management->System information module, Edit->Default invoice template[380].
2- To override for a customer: Customer->Customer information, Edit->Invoice template[297].
3- To override a specific invoice: Accounting->Invoicing, View->Invoice, and click the edit button (These changes can be printed, but they cannot be saved.)

Note that this only applies for customers where the "Legacy Invoice" option = No.

2)- You can now invoice multiple accounts on the same invoice[876]. To use this feature, obtain an invoice template from support@docudatasoft.com and apply this to the main account. In the sub-accounts, near the top of the billing section in Customer->Customer information, check the box to "Bill to another client[250]", and select the main account to bill to.

Note: Sub account invoice generation only works when invoices are created using Auto Selection. Manual invoice creation only creates invoice for main account. This is not compatible with departmental or RIMSLink invoicing.

9119 On ActiveWeb, allow box and file reports to be created based on search results, favorites, and work list

On the ActiveWeb report tab, three new options have been added for populating box or file reports:

1: From work list
2: From favorites list
3: From current search results

Report fields can be selected and results can be further filtered, as would be done with the standard box and file reports in ActiveWeb.

10145 Allow importing of boxes by barcode or box RC number for file imports

When importing file data, it is now possible to specify the box that a file belongs to by using the Box Barcode or Box RC# instead of the customer box number. This applies only to imports done using a description file. The corresponding fields are "BoxBarCode[791]" for the box barcode, and "BoxDDNo" for the box RC#.

9769 When deleted box gets accepted back IN, change file status to IN as well

If a deleted[191] box is returned to the record center, the files deleted at the same time are returned to the IN state as well. If "File in Box Tracking" is set to "YES" for a customer, the deleted files should be individually scanned back in.

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10047 add "added (electronic)" to status choices in activity report module

The "added (electronic)" status has been added as a state that can be reported in the Inventory->Activity Report[534] module for files.

10049 Add the "Title" field to the Authorize User module interface.

The authorized user module has a new field called "Title"[304] . This field can accept up to 6 characters.

10069 Add price unit in customer price report

The price and customer price reports (available through Accounting->General Pricing[734] , and Accounting->Customer Pricing[743], File->View Report) have been modified to include a units column.

10071 Display full description of excluded items on report and delivery slips

The description of excluded items on delivery slips and excluded items reports has been modified so that the full description can appear.

9841 Allow export and re-import of label templates[88] , to facilitate switching

EDC allows you to define the layout of various thermal labels. Now it is possible to save and import these layouts. Note that there is still only one "Box label" at a given time. However, if you want to temporarily change this layout for a special project, you could save the exiting template, make the changes, print the unusual labels, then re-import the previous format. Unfortunately, the page layout must be reset each time, as this is not included in the exported information

10108 Allow changing of box cardboard on SELECTED items

It is now possible to rebox boxes[458] that are in the "Selected" state using the box module.

This is useful if outgoing boxes are damaged and should be changed. As with boxes that are "IN", open the Inventory->Box module, press F10, and scan the bar code. The label will be printed. If the minimum number of touches have been exceeded, a reboxing fee and a box sale will be billed to the customer for the reboxing.

10213 Add ability to export EDM documents

It is now possible to export EDM documents for a customer as follows:

Customer->Customer Information
File->Export documents[278]
Follow the prompts to specify which files to export documents from, and where to put them.

This work much like the image export function[277].

10211 Show the notes field in the preview results when using the data import wizard

When doing an import via the wizard[432], after doing a successful test with the "test" button, a preview of the first item to be imported is shown. In this preview the notes are now displayed as well.

10023 Add description to scheduled tapes report

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For the convenience of customers, the tape schedule report (Inventory->Rotation Schedule, File->View Report->Tape Schedule[493]) now includes the description field as well as the customer, tape number, bar code, and delivery date.

10191 Add web search fields on all extra fields

If a customer has extra file fields[284] (eg. Field 80 #5) defined, searches on these fields can be made available[289] in ActiveWeb.

10057 Add feature to list returns not imaged

To quickly identify deliveries for which no return slip has been imaged, go to the Orders->Delivery Imaging[665] module and select File->View returns not imaged[667] from the menu.

10148 Add "out to date" field to box and file report fields

EDC allows you to create report layouts for customers[710]. Out to and Out date fields are now available. This is very useful in creating aging reports that can help a customer to ensure that items they have ordered do not get forgotten and lost.

This is also available for reports in ActiveWeb.

10157 Allow creation of PRINTED labels & items in EDC RC

Now that In-House management is available in ActiveWeb, record centers require the ability to create PRINTED items and labels on the rc side just like they already do for PREADD boxes and tapes.

This function is in the Maintenance->Box and File Maintenance module, File->Auto-Create PRINTED Boxes | Files[429].

10277 Move pager options to building module

The pager options[358] for rush order notification have been moved to the building module, so that this can be made a mandatory part of setting up a new building in EDCRC. It is now visible directly in the window rather than having to access it through the menu.

10328 Improve full text search speed and functionality by changing to the SQLite engine

The full text search[498] engine has been replaced to make both indexing and searching much faster and permit more powerful and intuitive searches.

- The search is not case sensitive
- To find an exact phrase, use double quotes. Example: "the quick brown fox"
- To exclude a term, use the "-" sign. Example: -difficult
- To find records that have 2 terms close to each other (proximity search), use the NEAR operator. The default is within 10 terns. To find records that have the word A separated by 5 or less words from B, try A NEAR/5 B.
- When the search contains multiple words, the default is AND. For example, searching for A B will find records that contain both terms.
- If you wish to identify records that contain either term, use the OR operator. Eg: A OR B
- Search operators such as "OR" and "NEAR" must be capitalized, or else they will be treated as search terms.

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10338 Add a departmental interclient move

You can now move items from one account to another by department. This is in the Maintenance->Box and File Maintenance module[414], Edit->Inter-client move->By department[421].

It will not work if the account has open shelf files, since a shelf may contain files from multiple departments of the same account.

9682 Enhance the interface for auto creating disposal lists[542] to allow lists for multiple departments to be created at once.

The functionality to auto create disposal lists[542] has been enhanced. The interface now allows you to set the disposal date range, record series, departments, and restrictions to include in the automatically created disposal lists. If the account is billed by department and you have selected multiple departments, the system will create a list for each department that has boxes to include. It will include the department name in the name of the disposal list.

10359 Give warning when creating new invoice selection if some invoices on the current selection are not done.

The "invoice selection[695]" tracks which invoices have been created and which are ready to be created. If a is a list of invoices to create based on the parameters in set in the customer information module. When the invoice selection is created for a period, the previous select is overwritten. Now, in addition to warning you of this, the system also checks the status of invoices on the selection and warns you if any have not yet been created.

10000 Make the description field from the department module appear on detailed invoice

Now both the department and its description appear in the detailed invoice. Note that this applies to customers that have the billing setting in Customer->Customer Information module[250] set to department. It only applies for invoices created after this update, as it is stored at the time of invoice creation.

3.3 Changes 5.70 to 6.00 (2012 Official Release)

General comments

Version 6.00 introduces important changes to EDC RC and lays the groundwork for even greater ones. We have improved scalability, security and performance of your software.

CHANGES 5.70 TO 6.00 (2012 OFFICIAL RELEASE)

5.70

10374 Support PHL 1300 to replace PHL 2700

EDC now supports the Option PHL1300 PDT. This device is similar to the PHL2700, which is no longer available for purchase. Support for both of these PDTs in EDC will continue as support for browser-based mobile PDT functionality is introduced. (See notes on delivery preparation with wireless PDT in 10809 below.)

People familiar with the PHL2700 PDT will observe the following differences:

- The PHL1300 is smaller and lighter.
- The layout of the numbers on the keypad is similar to that on a phone.

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- The Q1 and Q2 buttons replace the F7 and F8 buttons for scrolling up and down
- The sequence to enter the system menu is "Power off the unit, hold the 1 (one) and, (dot), press and release PW button".
- The dip switch setting for programming the PDT is 1,4,5, and 6 ‘ON’, and for use with EDCRC is 1, 4, and 5 ‘ON’.

For more details, please see the technical manual.

10357 Add option to not export withdrawn boxes/files in customer CSV export

When exporting boxes or files to CSV via the file menu of the Customer->Customer Information module, EDC now asks whether or not to include withdrawn items.

10393 Create line-item shredding report

If you wish to issue certificates for destruction of non-inventory items, you may download and configure report #114 to the Inventory->Report (SQL) module. The top part of this report consists of a template for a certificate. Below this is a list that pulls items from your invoice. You may specify which price codes to include. Note that as with all reports, you may also need to ensure that the query uses the correct date format for your system, as specified near the top of the Management-> System Information module of EDC RC.

10432 Fix problem with per page scanning costs missing sent when courier billing is by item type

The problem where per page charges were absent from imaging on demand and fax deliveries for customers with "item type" or "item type round trip" courier billing not "departmental billing" has been fixed.

9912 Implement transport containers

(Please read and understand this topic before applying the update, as it results in several minor changes to daily operations.)
EDCRC now requires the use of transport containers for shipping files, and optionally supports it for shipping tapes and boxes.
Transport containers provide a more secure mechanism for transporting files and tapes, promoting better protection against accidental breaches of privacy regulations such as HIPAA. The new functionality in EDC permits you to optionally track the location of and history of transport containers, and optionally charge rent to customers that keep containers after the delivery is completed.

For customers that are billed by container, the number of containers that they are billed handling for will now be taken from the number of containers scanned rather than from a manually entered number.
If your record center does not wish to use and bar code transport containers, you may simply create a default transport container bar code and scan this whenever it is called for when processing outgoing files.

- Transport containers are used when delivering files and (optionally) tapes.
- Items are scanned to transport containers during the truck validation process, which is now required.
- Transport containers are barcoded, and their history is tracked.
- It is possible to charge rent to a customer for a transport container for the number of days that it is out to them.
- EDC no longer prompts for the quantity of items shipped. If the "Container" courier billing method is used, EDC calculates this based on the number of boxes and containers scanned.
- On the return, transport containers can be scanned as empty or full. Delivery handling for the item is not charged if it is "empty".

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New standard operating procedures for working with transport containers are available. Please see the standard operating procedures section of our website (http://www.docudatasoft.com/EDC%20RC%20Standard%20Operating%20Procedures)

10449 Allow volume change of locations when "all sizes" flag is set to yes

It is now possible to change the size of locations that are set to accept all sizes. Changing the size of the location does not affect the size of boxes that are currently in the location.

10407 Display a pop-up warning when important configuration information is not input when creating a new Authorized user.

When you save a new authorized user profile, EDCRC now displays a message reminding you how to add a password for the user. The message will also notify you of any of the following:

- No user groups are present
- No departments have been assigned
- No Delivery addresses have been assigned.

Note that this is only a reminder, and the record will save a usual. The reminder about the password will always appear, as it is not possible to add the password without first saving the user profile.

10452 Remove the location barcode validation on the PDT to address alternate barcodes lengths conflicts.

A new option has been added to the PDT to allow record centers to work with alternate location labels that have the same length as item alternate labels.
- This option appears on the PDT under "4-Utilities", as "6- Chk barcode length".
- The default behavior is to check barcode lengths.
- Changing this setting from 1 to 0 results in the system accepting location barcodes of a length that has been assigned to box or file barcodes.
- It is necessary to re-configure the PDT after setting this option.

10469 Add ability to import future delivery dates for boxes and tapes

It is now possible to import a list of future delivery dates for tapes. If a specified delivery date is not a working day, the date is rejected and a message appears in the import log.
The import is done as a standard box import, with the following fields added:

EDCFieldName	Type	Example/comments
==========	====	==========
DeliveryDate	Date	2011-09-01
AddressCode	Alpha	Matches to the customer's first delivery address in the delivery address module with the specified code. (Not required if customer has only one address.)
DeliveryTime	Boolean	"-"=AM, "+"=PM

Note that these options are not part of the import wizard. This functionality is used by adding the necessary lines to an import description file.

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10084 Print authorized user names on the delivery slip

Print authorized user names on the delivery slip.

- In the authorized users module create a new tick box field defining if the user will be authorized to sign delivery slips.
- The names of all the authorized users of the account with this checkbox selected in their profile will appear on the delivery slip.
- To reduce space usage when there are many authorized users the names will be printed one after another with a tick box preceding the name. For example: [ ]user 1 [ ]user 2 [ ]user 3
- A signature line appears below the list of names, as follows: "Signature: _____ Time: _____"
- The new method will be used if at least one user for the account has the "authorized to sign delivery slips" option selected. Otherwise, a line will appear for the recipient to print their name.

8667 Add ability to directly modify delivery route templates

A new interface has been added to permit you to directly modify the route templates that are used to help automatically assign deliveries to routes when routes are created.

This is available through the Orders->Delivery Maintenance module, on the File->Route Templates menu option.
When you add or edit a route template, the editor appears. You may add delivery addresses. The delivery time for each address will default to 4:00 PM. You may re-order the addresses by assigning an earlier or later time. Note that the time is used only for ordering purposes, and will not appear on the delivery slip or paperwork. The same address may have a different suggested delivery time on different delivery route templates.

5.80

10476 Create a delivery report listing all past and/or future deliveries and their details

To help you schedule orders for shredding service, a new delivery report has been added.
The report may be filtered by data range, service building, customer list, and delivery route. It includes deliveries from all sources including tape schedules, recurring orders, by date orders, and daily returns.

For the given dates and routes it specifies the number of stops, the total number of items of each type delivered, the total of each type to be picked up, and the number of each type of shredding to be done. It then lists each stop and summarizes the work to be done there.

10483 Add user field 2 and 3 as optional fields on the "on file" file pick label

It is now possible to add fields 2 and 3 to the file picking label. This can be done by editing the "On file" label template, via Management->System Information, Edit->Label Templates

10512 Implement "Next trip" delivery type

A new ship mode is available called, "Next Trip". Orders for delivery with this ship mode can be placed for "As soon as possible", or for "Not before" a specified date. Picking lists can be created for "Scheduled", "Next trip", or both picking models, and also for specific delivery routes. The same is true of delivery creation. To make use of this feature, create a delivery type using this ship mode and make it available to your customers.

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Note that upon delivery creation, the delivery date for such orders changed to the date on which their delivery was created.

10523 Include the login name in the scroll list (CTRL-S) of the authorized users module

10549 Move delivery route editing from system info module to delivery maintenance

The delivery route template editor has been moved to the delivery maintenance module, since it is now possible to edit the route stops directly, and this functionality must be available to employees who might not have access to system info module.

10535 Add ability to have box location appear on file labels
It is now possible to include the box location when printing thermal labels for files. This is available via Management->System Information, Edit->Label Templates, for the File labels.

5.81

10593 Make OCR left and top values configurable for delivery imaging

To improve the recognition of delivery slips and return slips by different record centers (in the Orders->Delivery Imaging module), the position of the OCR zone can now be adjusted. These settings are found at the end of the Management->System Information module.

10438 Include ADDED activity in activity report invoice attachment

The activity report includes activities In, Out, Deleted, Destroyed, Transferred, Sampled, Revised, and Sent to depot. It now also includes new boxes/tapes "Added".

10520 Add delivery type column to list of deliveries

A column for delivery type has been added to the scroll list view (Ctrl-S) for the delivery module.

5.82

10682 Add ability to support leading wild cards in full text search

Support for leading wild card characters (i.e. searching for *value) has been restored to EDCRC and ActiveWeb.

10684 Add "Position" field to authorized users module

A position (CEO, President, VP, Secretary, etc...) field has been added to the authorized users module. This information is visible when selecting a user from the user list during order-taking at the record center.

10671 Add interface to define/edit labels and field definitions via ActiveWeb.

In ActiveWeb, it is now possible for users to define their own label templates for printing box, file, and location labels. The interface allows the user to select a label format, add fields, change the font size, and drag the fields to the desired position.
Management level users may also rename fields, make them mandatory or hidden, and add drop-down lists for selected fields.

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This functionality is found on the configuration menu.

At the web license level, all of these functions require the ‘Management’ module. Location labels apply only to those that also have the ‘Active File’ module.

Users must be part of a user group that has “Web management” module.

10692 Support auto box number when doing box accession in return module.

If an account has the Auto box number option set to ‘Yes’, the box number field no longer appears when adding new boxes in the return delivery module, and box numbers are automatically assigned.

10698 Add ability to move a file from shelf to box in file module

Functions have been added to the Edit menu of the File module to permit you to transfer files between open shelf storage and box storage. If a file is transferred to a box, the box must have a status of PREADD. If the file is transferred from a box to a shelf, the status of the file goes to PREADD. This functionality should be used with great caution.

10700 Fix truncated strings on PHL 1300

Because the PHL 1300 has fewer characters available on its screen, it was necessary to abbreviate certain strings for information to be displayed clearly.

10707 Support F6 key to accept current record with data capture program

If you are using a wedge scanner to assist in data capture using the EDC DataCapture program, you may program the wedge scanner to send the ‘F6’ key instead of Ctrl-Enter in order to go onto the next record. This adds greater flexibility in streamlining data capture operations.

10687 Redesign dictionary interface and tables

The dictionary module has been re-designed to permit it to accept longer strings and make it easier to translate into other languages.

10719 Create mobile web interface for ActiveWeb.

Significant work was done to improve the use of ActiveWeb on mobile devices such as smart phones and tablets. This is accessed by adding ‘/mobile’ to your usual address for ActiveWeb.

10741 Add ability to update a file with the import using the file bar code

A new field called ‘BoxBarCode’ is now available for use in import description files.

This new feature permits the import of file data from a spreadsheet by matching based on the file bar code. This is used for matching purposes only. If you wish to import a file alternate bar code, use the ‘BarCode’ field.

Note that this feature is available for use in description files but is not in the import wizard.

Sample description file:

```
BeginTable
```

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```
FieldsIDType   column
FileType separated
Separator    ,
Delimiter      "
Tablename      File
*skipfileboxintegrity
*RejectOnDuplicateAltLabel
*FileModifyOnly
DataFileName   c:\dev\work2\importtests\filedata17.txt
DefaultEDCFieldValue Activity(PREADD)
DefaultEDCFieldValue DocType(DT1)
DefaultEDCFieldValue CustKey(001)
DefaultEDCFieldValue MainDeptName(MD1)
DefaultEDCFieldValue SubDeptName(SD1)

BeginField
FieldID      1
EDCFieldName FileOwner
FieldType    alpha
EndField

BeginField
FieldID      2
EDCFieldName FileBarCode
FieldType    alpha
EndField

EndTable
```

10748 Add ability to update a box with the import using the box bar code

A new field called ‘BoxBarCode’ is now available for use in import description files.

This new feature permits the import of file data from a spreadsheet by matching based on the file bar code. This is used for matching purposes only. If you wish to import a file alternate bar code, use the ‘BarCode’ field.

Note that this feature is available for use in description files but is not in the import wizard.

Sample description file:

```
BeginTable

FieldsIDType   column
FileType separated
Separator    ,
Delimiter      "
Tablename      Box
*skipfileboxintegrity
*RejectOnDuplicateAltLabel
*boxmodifyonly
DataFileName   c:\dev\work2\importtests\boxdata11.txt
DefaultEDCFieldValue Activity(PREADD)
DefaultEDCFieldValue DocType(DT1)
DefaultEDCFieldValue CustKey(001)
DefaultEDCFieldValue MainDeptName(MD1)
DefaultEDCFieldValue SubDeptName(SD1)
```

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```
DefaultEDCFieldValue Volume(1.2)

BeginField
FieldID      1
EDCFieldName BoxOwner
FieldType    alpha
EndField

BeginField
FieldID      2
EDCFieldName BoxBarCode
FieldType    alpha
EndField


EndTable
```

10723 Print image separator pages by scanning the barcode

It is now possible to print image separator pages from EDCRC by scanning the bar code of the file in the Inventory->File module. These pages print one at a time, in the order in which the files are scanned.

10760 Improve the users module in ActiveWeb

The users module on ActiveWeb now displays the list of users and permits users with the proper web license and permissions to select the web license type to assign to other users. Newly created users are now created as 'Active' by default.

6.00

10761 Add user group module in ActiveWeb

A new interface has been added to permit supervisors to define and edit user groups. They cannot assign rights to a group that they themselves do not have access to.

10781 Ability to send delivery and return slips in TIFF format

In the customer information module you may select a format to send invoices in. E-mailed delivery and return slips now use the same format that the invoice uses. This is useful if the customer has difficulty opening PDF files in Outlook.

10613 Specify the default delivery building based on the delivery address.

When an order is placed for line items, EDC must determine which building these items should be shipped from. This is now determined by the delivery address of the delivery. If a delivery building is not configured for the delivery address, the customer's default delivery building from the customer information module is used.

10812 Sort custom invoice headers by group number rather than alphabetically

Invoice groups on the custom invoice now sort in the same order as they do on the legacy invoice layout rather than alphabetically. This should make the custom invoice feature useful to record centers that have not previously made use of it.

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10454 Add option to activate backlight on PHL 1300

It is now possible to activate the backlight on the PHL 1300 PDT. To access the feature, go to 4-Utilities from the main menu screen.

10797 Allow adding or editing the alternate label in ActiveWeb

10796 Display the recipient name and out date for OUT (In-house) status in ActiveWeb

10758 Add "Today" button to calendar in ActiveWeb

10824 Make EDM integration tools compatible with 64-bit Windows and MS Office.

Users who are managing electronic documents on ActiveFile or ActiveWeb may send e-mails directly to EDM, and may send other documents to EDM by right-clicking on the document or by clicking a button on a Microsoft Office (TM) toolbar. This functionality is now available on 64-bit systems as well as 32-bit ones.

10834 Enhance EDM to extract document summary information from docx, xlsx, pptx files

10460 Prevent files from being imported as IN without assigning to a box or shelf.

10498 Prevent status field in unformatted reports in ActiveWeb from wrapping across lines at the end of pages

10604 Display summary report after imaging on demand

Upon completion of imaging on demand, EDC now displays a report that includes the delivery number, file numbers, scanned image count, and a blank line. This can be useful for tracking file preparation time.

10693 Disable file number field when adding an auto-inventoried file on an order with auto number

10850 During invoice preview add option to not compute eDocs volume

10852 Allow 4 decimal places for taxes

10802 Full text search should index RC number for boxes and files

10809 Add packing operation to mobile scanners

A major enhancement in version 6.0 of EDCRC is the introduction of web browser-based PDT functionality that can be used on devices such as smart-phones, tables, and regular computers.

This browser-based PDT functionality is being implemented in stages. The first stage to be implemented is the Delivery preparation functionality including ‘packaging’ of files and tapes, and the subsequent ‘truck validation’ step.
Please see our new SOP for details. Existing PDTs will continue to be supported.

10862 Prevent return of transport containers when the delivery type is fax or imaging.

10856 Ensure that if a field is made blank in ActiveFile, the change is replicated to EDCRC.

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10509 Allow import of valid recipients at RC

To place an order for a box or file, EDC RC requires a recipient name for tracking who the item is going out to. There is a customer option limit this to a list of valid recipients. It is now possible to import a list of valid recipients through the EDC RC using an import description file.
Sample import description file:

```
BeginTable

FieldsIDType   column
FileType separated
Separator    ,
Delimiter      "
Tablename      Recipient
DataFileName   c:\ImportTests\RecipientData.txt
DefaultEDCFieldValue CustKey(002R)

BeginField
FieldID      1
EDCFieldName ShortName
FieldType    alpha
EndField

FieldID      2
EDCFieldName FirstName
FieldType    alpha
EndField

BeginField
FieldID      3
EDCFieldName LastName
FieldType    alpha
EndField

FieldID      4
EDCFieldName MiddleInitial
FieldType    alpha
EndField

BeginField
FieldID      5
EDCFieldName Email
FieldType    alpha
EndField

BeginField
FieldID      6
EDCFieldName Title
FieldType    alpha
EndField


EndTable
```

10842 Add ability to specify next client return date when sending a tape to the record center on an itemized return.

Back-up tapes are generally kept for a pre-determined length of time at the record center, after which

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they are returned to the client for re-use. This has traditionally been managed by setting up rotation schedules. As an alternative, tape clients can now specify the next date that they wish to receive the tapes as they are placing orders for itemized returns.
This feature is available when checking out an order on the 'my cart' tab of ActiveWeb. Once a date is entered, it may be filled down to the tapes below it on the list.

10875 Add an administrator email address to the system information module in EDC RC

If the database that hosts the images and electronic files in ActiveWeb encounters errors, it sends an e-mail notification to the administrator. This e-mail address is configured at the top of the System Information module.

10854 Increase password security

Several changes have been made to increase password security in EDC RC and ActiveWeb:
- It is no longer possible to view the password in the Authorized user module.
- The technical aspects of how passwords are stored and verified have changed. They are now verified using salt and hash methodology rather than transmitting the password itself in an encrypted format. This is more secure.
- As a consequence, passwords are now case-sensitive.

10870 Ensure that sequence numbers for full text search are reset properly creating a new account based on a template.

10888 Enhance delivery slip to show all transport containers used on the delivery

10899 When running the total volume report for future dates, adjust for withdrawn boxes.

10913 Add totals to the commissions report

10849 Add function to export the commissions report to CSV

10679 Show city in delivery address selection lists

The city field now appears in the list for selecting delivery addresses. This is important for operations such as scheduling shredding, where different cities are likely to be serviced on different dates and different route templates.

10869 Adjust inventory levels when line items are added using the Delivery Billing module.

10920 Wrap long locations to new line on PDT

To view full alternate label use the "9" more key when picking box or file.

10924 Enhance performance of delivery creation to make it faster

10941 Boxes may have empty withdrawal date after a deletion list from ActiveFile

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3.4 Changes 6.00 to 6.25 (January 2014 Official Release)

General comments

Version 6.25 introduces numerous changes that improve performance and user experience. Record centers with less activity will appreciate the option to page for every order, while busier record centers will start achieving greater efficiency by packaging and performing their deliveries using rcMobile.

Changes 6.00 to 6.25 (2013 / Jan 2014 Official Release)

6.00.17+

10940 Add web searches by order number, order date, delivery number, delivery date

10949 Hide commission fields[248] in customer module if current user does not have commission report access

10945 Fix blind spot in delivery totals report[380], add customer name

10953 Add next return date as a report field and search result field in ActiveWeb

10960 Do not display delivery receivers on delivery slip if the courier method is imaging

10935 Add a history[773] item to the file when an electronic document is deleted from it.

10952 Add option to Add or Replace next scheduled delivery date for items in work list.

10961 Indicate quantity of pages scanned for imaging deliveries on the “view charges” function in delivery billing.

10915 Allow transferring a file from OUT to In-Inhouse (reactivate) in ActiveWeb

10600 Add ability to delete boxes and files added via an import

10210 Add activity report to ActiveWeb

10968 View detailed box/file report should not show data for inhouse items at RC

10301 Add new EXCLUDED history for items not found during picking

10907 Add ability to make price codes inactive and hide them when assigning price codes to services

10394 Make InHouse states available in the drop-down list for item status in the data import wizard for boxes and files

10833 Enhance user-defined labels in ActiveWeb to allow addition notes fields and wrapping of text to subsequent lines

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10994 Send email to the user when password has changed in ActiveWeb

10645 Fix the “email overdue memo” on ActiveWeb
10895 When determining if license count is exceeded for an account in ActiveWeb, count each license configuration separately
10696 Prevent location from being switched to and from vault status when items are in location

6.10

11008 Add container-based delivery with PDT on legacy PDT

During truck validation, files and optionally tapes are scanned into transport containers for delivery. If your record center performs delivery with PDT, you may now indicate that items have been dropped off by scanning the transport container rather than having to scan each item. If you have clients that do require you to scan the contents of containers then set the “Scan transport container cont” setting in the Customer->Customer Information module to “Yes” for these accounts

11025 Permit the use of a different logo for ActiveWeb on mobile devices

If you wish to use a smaller login logo for mobile devices in ActiveWeb, then you may replace login_logo_mobile.jpg during deployment of ActiveWeb.

11001 Increase number of images in ActiveWeb image preview
10980 Add ability to not print labels when adding PREADD items
10835 Make sure the refiles go in order of location and boxes too
10789 Ignore empty transport containers when breaking down charges by department
11034 Rename Scan" right to "View""

11006 Interactive delivery calendar widget for ActiveWeb

For authorized users with the necessary permissions, the home page of ActiveWeb now includes a delivery calendar. This calendar lists the number of past and future deliveries on each date, displaying one month at a time. It is possible to click on a date to view the deliveries and from the deliveries to view the items. These items can be added to a work list, making it easy to request a specified return of items delivered recently, such as back-up tapes.

11056 Permit departmental invoices for service-only clients
11062 Make number of failed login attempts in ActiveWeb and ActiveFile configurable

Prior to this change, entering 10 incorrect passwords consecutively within 10 minutes caused the profile of an employee or authorized user to be made inactive. The number of incorrect login attempts for ActiveWeb can now be configured in the Management->System Information module using the “Max web failed logins” setting near the top left of the general section.

6.20

10818 Add box and file internal location reports to ActiveWeb

10947 Hide return price code when ship mode is external

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11072 Add ability to view transport container items, and change transport container allocation

This change affects rcMobile. Once a container has been packaged into a container, the container number is displayed on the item. If you scan the same item to a second container then it is assigned to the new container and removed from the first.

10805 Allow printing bar codes for recipient on web

ActiveWeb users with a management-level web license and the correct permissions may manage the list of recipients who can be specified when requesting boxes or files. They may now also print corresponding bar codes which encode these names so that you can specify a recipient by scanning a bar code. To find this functionality, go to Configuration->Recipients in ActiveWeb and click on the printer icon to add the recipient label to the print list.

10847 When selecting accounts in EDCRC, permit rapid searching by customer key or account name

During operations that require you to select an account, EDCRC now present you with the option to search by customer name or customer, or you may press F5 to select from a list. Note that this search is no longer case sensitive. (You may have difficulty when searching by customer name if two accounts have names that are identical except for capitalization.)

11113 Add option to access active docs at RC

With this option set to “no”, if a client that manages active records in ActiveFile or ActiveWeb chooses to have this data stored or backed up at the record center, all metadata for these records is concealed and cannot be accessed via the EDCRC interface. This is important to clients that wish to use ActiveWeb hosted at the record center for managing confidential InHouse records that can never be stored off site.

10817 Add 'Box Volume' to the search criteria available in the search module and other search interfaces

10999 Add deploy wizard for rcMobile

You may now deploy rcMobile as a web application in the same way that you deploy ActiveWeb and the ActiveWeb web portal. From the menu of the Management->System Information module, select File->Deploy rcMobile. This must be done from a computer that has the Java JDK installed on it.

10972 Update login page process so that ActiveWeb opens in the same window

11063 Implement delivery methods in rcMobile

Most functions currently performed by drivers with the PDT are now available in rcMobile. The exception is emptying shredding containers. This will be coming in the next release, along with other enhancements to shredding functionality.

For details on using rcMobile, please see our video tutorial, SOP documents, or the topics in the manual.

11106 Add “Add” button also on top button like the Update button

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10979 Add copy and add option on the web (boxes and files)
11165 Ability to override quantity shipped in Delivery module

9788 Allow full text indexing of word and PDF documents

11153 Make ActiveWeb account set-up wizard available through the customer information module

11171 Finish Opticon H13 port

11172 Enhance ActiveWeb to display eDoc search results

11198 Increase customer accounting key from 30 to 80 characters

11199 Add option to have separate box return and accession fees

6.25

11209 Add option to replicate/backup in-house records from ActiveFile to RC

11147 Ability to remove a web license assignment from a user

11214 Allow blocking ActiveWeb connections based on IP address

11225 Add sales tax codes help associate taxes to tax accounts when exporting invoices to Quick books

11226 Fix an error that can arise when importing files for accounts that use automatic file numbers
11237 Adjust inventory levels for price codes with maintained inventory levels when canceling order
11222 Add functions that can be used in SQL reports to get the most recent history date and person from box history.
11249 Improve searching on extra file fields in ActiveWeb
11246 Fix a case where subtotal calculation did not appear on detailed invoice if the last item was 0 charge and hidden.
11240 Fix the report of unbilled customers for customers that have separate storage and service, and remove service-only accounts.
11262 Implement a full export of client data at RC including eDocs, to facilitate transfer of accounts between EDCRC databases.
11280 Unlock the profile of an authorized user when they successfully reset their password
11263 Include the customer key as well as the invoice number in the subject line when invoices are sent by e-mail
11275 Change “Delete" to "Remove from list" in windows such as the generate web license interface
11276 Make it possible to add customer fax and salesperson to the custom invoice templates
11243 Remove location from items when they are removed from a return
11269 Show weekend deliveries in the recurring order report

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10608 Add history when eDoc or image is emailed
10611 When a user completes a list of boxes for disposal in ActiveFile, notify them that they must send the signed disposal list to the record center

11292 Allow defining delivery receivers and pin numbers in ActiveWeb

10766 Prevent pasting into Data Capture fields requiring double entry

10140 Option to page for every order that comes in

10617 When a box is returned for an account with box and file tracking, make it possible to print the report of unscanned files
10618 In full text search indexing, treat hyphenated words as whole words rather than separating what comes before and after the '-'
11308 Replace VisageSoft PDF library with QuickPdfLibrary, to accept newer formats when importing images

11304 Change how EDC determines which data source (DSN) to use for running SQL reports, adding it to the dc.cfg file.

11300 Add a message in the main error log when a user profile is deactivated due to entering too many incorrect passwords
11317 Add ability to print the transit location of a truck to Management->Delivery Vehicle
11255 When displaying message that the return of an item has already been requested, display the number of the original order

6.25.10

11339 Create an unloading operation for rcMobile so that items are available to be ordered once they are unloaded rather than as soon as they are scanned to the delivery
10006 If an account is made inactive while it still has a valid web license, block the operation and display a message that the web license must first be canceled
10286 When creating a user group, prevent addition of delivery types that the customer does not have access to
11345 Add Quick books "class" field to general pricing for invoice exports
10051 Make it possible to update box and file notes fields using the batch update function in the box and file maintenance module

6.25.20

11164 Add unloading operation to rcMobile interface. Users select the selection method, the transit location to unload to, then the route or delivery to unload.
10811 When placing an order for an itemized return, reject a file if its box is not IN.
10929 If the recipient of an item changes after picking starts, add a change of hands history and during truck validation warn that any picking label must be reprinted
10955 When downloading pallets for disposal, only display pallets that are in the current building
10991 Add separate customer options to make orders for box or files default to permanently out[248]
11357 Extra message on destruction authorization report for NAID certification
9757 Add Data capture notification e-mail address to customer module

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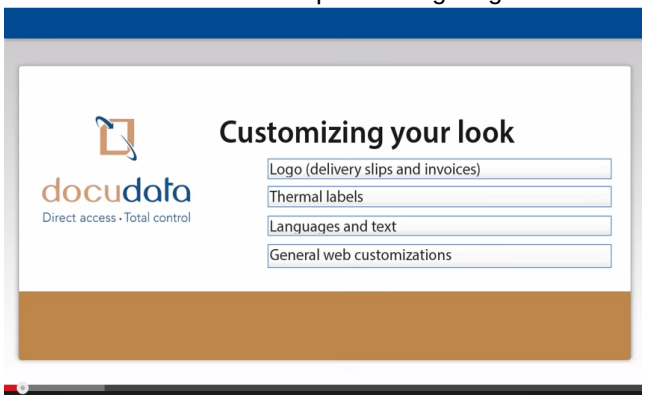
11367 For accounts with file in box tracking, add a process error and e-mail a warning to the data capture e-mail address if boxes are received without files

11357 Add a modifiable string (#5892) to EDCRC's standard disposal list authorization report, to assist with NAID certification compliance.

11356 Make adjustments to support check-in/checkout on a MAC

4 General Concepts and System Overview

For a tour of EDCRC with tips on navigating within the interface, please watch the following video:



Navigating in EDCRC

4.1 Logging on to EDC RC

Logging on to EDC RC with the correct credentials permits you to access the functionality that you require in order to do your work and permits the system to keep an accurate audit trail of operations such as entering orders, performing data entry, creating deliveries, and so on.

Operations performed on the PDT are tracked based on who is logged onto the PDT when the scanning is done rather than who is logged onto the computer when the work is uploaded.

Steps for logging on to EDC RC:

1. Locate and double-click the short-cut to launch the program. The icon looks like a small yellow box in front of a large blue file

2. In the window that appears, enter your login name and password, then press **Enter**. Alternatively, press **F5** to select your user name from the list, then enter your password.
3. If you are successful, you will arrive at the main window of EDC RC.

Note:

- Passwords are case-sensitive as of version 6.0
- Entering an incorrect password for a user 10 times within 10 minutes will inactivate that employee's profile. Someone with access to the employee module will then have to activate the profile and help the employee to assign a new password.
- When selecting your name from the list by pressing F5 as described above, only active employees

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appear.

Related topics

Navigating between modules 63

4.2 General concepts of off-site record management

General

The goal of an off-site record center is to efficiently manage the documents of its customers while allowing them excellent access and control. Off-site record centers enable customers to use their higher cost office space more efficiently by keeping their most active documents in internal storage and sending less commonly used 'semi-active' records to lower cost off-site storage. They may also provide greater security as well as additional services including destruction of items at the end of their retention period.

Online access permits customers to manage off-site records as well as their in-house and electronic documents using a single platform.

A variety of delivery options allow customers to balance urgency and economy in accessing their off-site records.

The billing procedures for off-site record storage can be complex since there may be many different types of services involved. The inventory for a customer may fluctuate throughout the month as boxes are added and destroyed. Furthermore the costs may have to be redistributed on a departmental or on a charge back level. Relating charges closely to the services provided leads to a billing model that customers recognize as fair.

Due to the variety of tasks related to record management, not all users of the system have the same responsibility. Some users may be responsible for maintenance of inventory only; others may have access to billing information to control costs; some users may only be assigned to certain departments. The record management system must control the access to the information.

Inventory

Inventory control is at the core of all record management systems. It must be possible to determine the position and state of all documents at any given time. You should be able to view the history of the box, and identify specific boxes using the related details , etc.

In order to track boxes and files accurately, each item is labeled with a bar code 866 ; this bar code is scanned with a bar code reader or a PDT 762 every time an item is delivered and returned to the off-site center.

To maintain the inventory of every box or file, the activity of each item is tracked individually in the history. For example: in-box files that are not listed in the inventory may still be ordered as non track files; because of that, they are still controlled in a limited fashion.

In order to answer to these specific needs, the EDC software allows the addition of boxes and files to the inventory in a simple and direct manner. It then automatically prints bar code labels for each document added (certain conditions apply).

Removal of boxes from the inventory can also be necessary for various reasons. In that case, the system allows the creation of disposal lists. After approval, the boxes will be treated according to the disposal

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mode (destruction, transfer, deletion, etc). Disposal lists can also be created manually, one item at a time. Boxes may be removed from inventory if they are transferred to another storage facility or if they are simply not returned to the center after having been ordered. Same thing for a semi-active box or file that needs to be reactivated after being removed from the inventory. In that situation, the system allows the recovery of the history before the removal.

For archiving purpose, the disposal dates can either be specified as a date or calculated on a record series or departmental basis depending on the conservation policy[866] of each customer.

Orders and deliveries

The ordering system allows the retrieval of boxes and files from the off-site record center. Orders may be delivered to the customers according to their different preferences and priorities.

If the option to group orders[248] is turned on, orders for the same delivery cycle and delivery address with compatible delivery types will be grouped onto the same delivery, saving labor and transport costs. This encourages customers to place orders as the need for items arises.

Billing

Generally the operating costs of an off-site record center contain at least the following categories : storing, labor and transport.

Storing costs are calculated in cubic feet per day, according to addition or retrieval of boxes. Labor costs are based on the length of time the boxes and files have been manipulated; transport costs are calculated according to delivery items. In order to keep control on transport costs, the EDC software allows to verify each delivery at anytime.

Users

Record center employees using EDC RC require user profiles and passwords for logging in. Profiles are used for tracking purposes and also to configure each employee's access to match their responsibilities. Access rights are typically assigned by assigning an employee to "Groups" that have been configured with the rights for performing a role.

Similarly, your customers will have authorized users with profiles that determine what records, delivery addresses, delivery types, and functionality each user has access to. They too can have user groups that match their roles.

4.3 Navigating between modules

Logging into EDC RC brings you to the main window.

The main window of EDC RC

The Main Window provides access to the modules which make up EDC. To the left, the available modules are arranged on 6 tabs. To the right is a list of opened modules. It is possible to have several modules open at the same time, including multiple windows of the same module. (For example, you could have one box module window open to perform data entry, and open another box module window to a different box to look for information).

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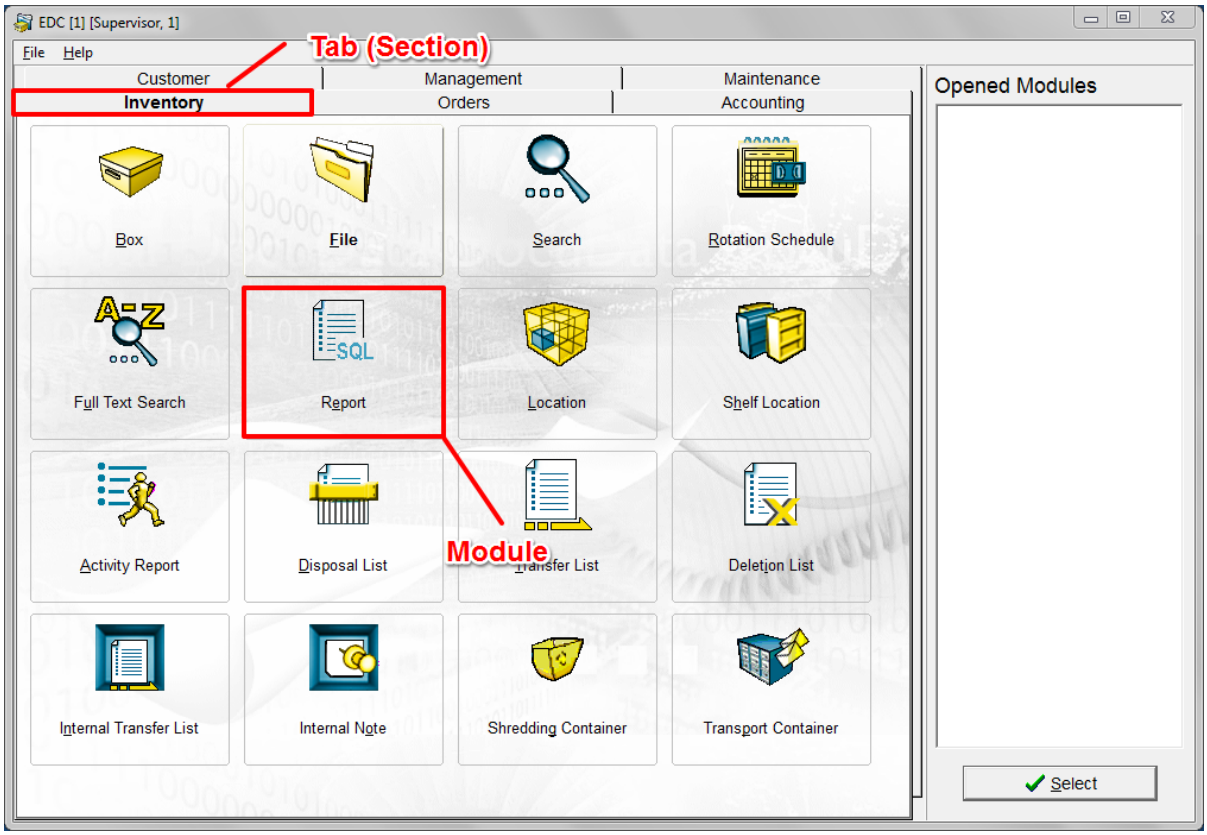

Opening a new module from the main window:

Throughout this manual, modules are referenced by giving the tab that the module is on, followed by the name of the module (e.g. **Inventory->Activity Report**.). The name of the tab that you are currently on will be emphasized with bold text and the modules of that tab will appear below.

1. If you are not on the correct tab, click on the desired tab. (Alternatively, using your keyboard press the **Tab** key until the desired tab is selected, then press **Enter**.)

2. Locate the module and open it in one of the following ways:

- **Left-click** on the module with the mouse
- On the keyboard, press the letter that is underlined in the module name (e.g. in the figure above, press **A** to open the activity report module)
- Press the **Tab** key until a box appears around the name of the desired module, then press **Enter**.

Switching between opened modules

You may have multiple modules opened at once, including multiple instances of the same module opened to different records. The list of opened modules appears in the Opened Modules pane, to the right of the tabs on the main window.

To return to a module that is already opened, do one of the following:

From the main menu:

- On the *main window* in the *Opened Modules* pane, double-click the module, or highlight it and click the **Select** button.

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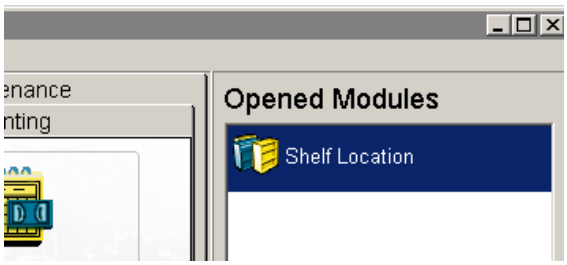
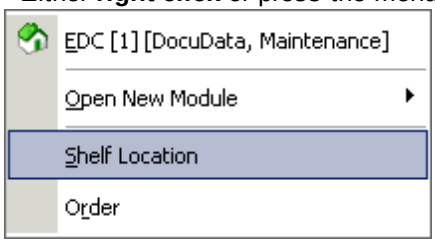


From within a module

- Either **right-click** or press the menu button on your keyboard (if present) to bring up a context menu.



- Click the desired module using the mouse, or highlight it using the arrow keys and press enter. The module will open.

Note: The context menu also permits you to return to the main window (top option) or open a new instance of one of several commonly-used modules.

Editing versus browsing

When you first open a module, it will appear in *Browse* mode, permitting you to . This permits you to navigate between records within the module.

To make changes to a record, you will need to enter *Edit* mode. Before exiting a module or moving to another record, you will need to return to *Browse* mode, by canceling or changing your modifications.

To switch to edit mode

Do one of the following:

- Press **Ctrl-E** on the keyboard
- From the menu, select Edit->Edit

Notice that the navigation buttons are inactivated and the green check mark to accept changes and the red X to cancel changes become active.

To switch to Browse mode

To cancel changes do one of the following:

- Press the **escape (Esc)** key on your keyboard.
- Click the red **X**.

To save changes do one of the following:

- Press **Ctrl-Enter**
- Click on the green **check mark**.

For more details, please see Working within a module 66

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Exiting

The ways of exiting modules in EDC are typical of most windows programs. You can click the Exit ('X') button on the top right corner of the window frame, press Alt-F4 on the keyboard, or go to the File menu and select 'Exit'.

Prior to exiting a module you must either cancel or save any changes that you have made.

If you attempt to close the main window of EDC RC while modules are opened, the program will attempt to close each module then close the main window.

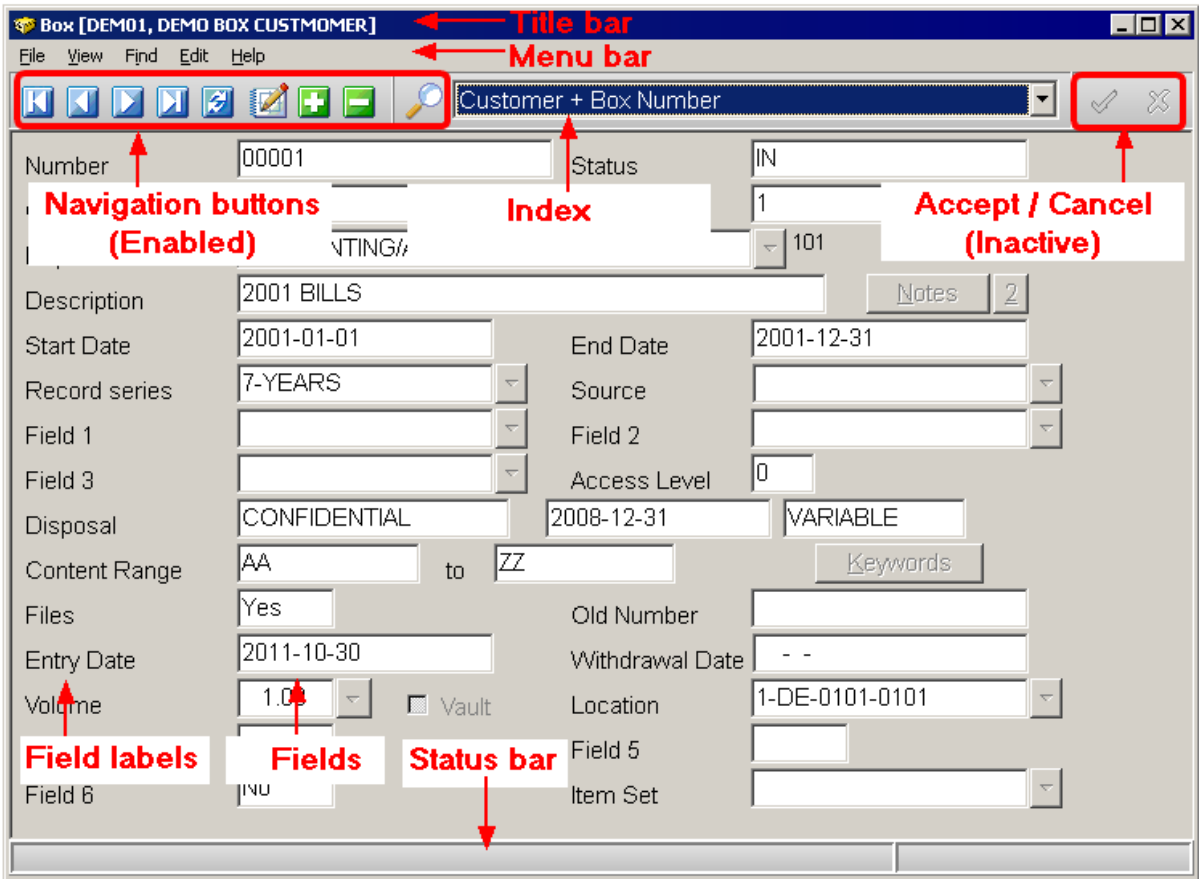
If EDC encounters a module in Edit mode, it will stop the exit process and prompt you to save or cancel changes in that module.

4.4 Working within a module

Module have two basic purposes:

1. They may present a set of related functions, through menu options and forms. Examples include the Delivery Creation module.
2. They may permit you to browse and modify a set of records. Such modules also present functionality related to these records. Examples include the box and file modules, Customer Information, etc.

Elements of a module window



Title bar: The title bar indicates the name of the window. Every module appears in its own window. The title bar of the main window displays which employee is logged in.

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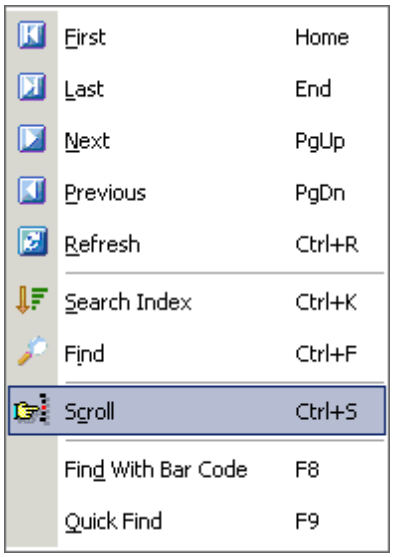
Menu bar: The menu bar allows to activate the software's operations. Every word represents a menu. A menu gives access to various menu or sub-menu items and appears in drop-down lists.
Navigation buttons: Navigation buttons are active when you are in browse mode but are grayed out when you are editing a record. They permit you to move between records.
Index: The index selected determines the sequence of records when navigating, as well as the search terms that will be requested when searching.
Accept / Cancel: These buttons become active when you are in edit mode. When searching they permit you to execute or cancel your search.
Field labels: Brief description of the meaning of the adjacent field. Please note that customer-specific field names appear in ActiveWeb but that in EDC RC the record center default values appear.
Fields: A field is a location on an entry form which displays specific information. Some fields may be modified, others are only displayed for consultation. A field is generally preceded by a label.
Status bar: This region of the window may display context-sensitive information. For example, if you pass the mouse over one of the navigation buttons on the button bar, this region will display the function of the button.

Menus, functions, and keyboard shortcuts

Most of the functions available with EDC RC can be accessed through the menus. The arrangement of menu options tend to be consistent from module to module. It is also worth noting that many of the more commonly-used functions can also be accessed more rapidly using keyboard shortcuts or buttons on the button bar.



In the first column of the *Find* menu pictured above, notice the icons that correspond to navigation buttons. Clicking the button on the button bar has the same effect as selecting it from the menu.

In the far right column, notice that many functions have keyboard shortcuts. These provide the fastest way of accessing functionality. If you use a function frequently, it is worth memorizing the associates shortcut.

I frequently use **Ctrl-S** to scroll through a list of records, **Ctrl-F** to perform searches, and from other menus F7 to print thermal labels, **Ctrl-E** to go into edit mode, and **Ctrl-Enter** to save changes. Shortcuts are also very useful when placing orders.

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4.5 Integrity Verification

The EDC RC software promotes a systematic work flow designed to catch any errors or omissions as soon as possible. If an item is forgotten in one of the steps, the error will be caught in the next step. This logic of checks and balances is especially visible when delivering and returning items.

Picking: An item will remain on the electronic picking list until its bar code is scanned or it is excluded (by pressing 2 for Next, 3 for not found, then entering the reason). If the picking list contains only boxes (not files) then they may be scanned in any order. However, the PDT only returns to the main menu once all items have been picked. Scanning an item that is not on the list produces a beep and error message, and the picker must clear this message before scanning the next items.

When the list is uploaded to the software, a report of any items not picked is printed, including items that were excluded and any items remaining on the list if picking was not completed.
Items skipped during picking with the PDT are returned to the "to be picked" state.
The treatment of items marked as "excluded" while picking on the PDT depends on the value of the Double Pick[261] option in customer information.

- With the option set to Yes, the first time the item is excluded on the PDT it will be returned to the picking list. If it is excluded a second time it will be marked as excluded in the system.
- With the option set to No, items will be excluded in the system the first time that they are excluded from the picking list on the PDT.

Typically, record centers chose not to use the double-pick option. Instead, when a file is not found the employee will "skip" the item on the PDT and bring the box back to an area where the lighting is better, for someone else to search. If a file is not found, people will commonly exclude the item using the manual picking[624] process directly on the computer, with the aid of the order number and item number found on the file picking label.

Picked items are collected in the shipping area. People will often group items by customer (based on the Customer Key found on box and file labels), to make the next steps go faster.

Delivery Creation: Delivery creation groups the existing orders for the specified delivery cycle into deliveries. Because ordered items may be excluded, deliveries will only become closed if all items on it have been either picked or excluded. If EDC is still awaiting picking results for a delivery, EDC provides a warning and the delivery slip for that delivery is not printed. The status of the delivery becomes Created, and the status of the order becomes Grouped. When this happens, complete the picking, then repeat delivery creation.

Packaging of files and tapes: For deliveries that are not performed electronically, it is mandatory to scan any files to shipping containers and possible to scan tapes to shipping containers before the validation of items to trucks can proceed. If you are using wireless PDTs, this process can start as soon as the delivery in question has been created. If you are not using wireless PDTs, this process is done as part of the truck validation procedure.

Delivery Routes: Delivery routes allow you to provide drivers with an ordered list of the deliveries that they are to perform. It is possible to print the delivery slips in order from this module, and also to download all of the deliveries for truck validation, and then for delivery with PDT, in single operations.

Truck Validation: Truck validation may be performed through the Delivery[631] module (for individual deliveries), but is typically performed through the Delivery Route[643] module. This may be done on the truck or in an area designated for loading onto that truck - ensuring that nothing is forgotten.

Truck validation uses the PDT to validate that all the correct items boxes and files are present. If an

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incorrect item is scanned, the PDT beeps and warns "Item not in list". This protects against errors in picking, sorting, and loading the vehicles. Truck validation applies to delivery types that use record center courier[724].

If you are using the wireless PDT, routes become available for truck validation on the PDT once the route has been created and all necessary packaging has been done.

Delivery with PDT: (optional by customer) After downloading the deliveries to the PDT, drivers may scan the items to be dropped off with PDT. Again, incorrect items will be identified as "not in list". If an item is omitted, the PDT will prompt them to scan it or manually confirm that they are unable to deliver it. (See the Integrity verification workflow: Box delivery[772] for a flowchart). Delivery with PDT also enables drivers to confirm that the correct items have been picked up, if the customer has identified specific items for return.

Return Delivery: When return deliveries are uploaded from the PDT, a list of any undelivered or unreturned items (if specific items were to be returned) is produced.

Items are then typically scanned to a holding location to sort boxes by size for re-shelving. If an item was not scanned on the return, it will be caught at this step. Files are scanned to file transit locations.

When items are re-shelved or re-filed, they go to the verified state. Any items that were missed will appear on the not verified items report which should be reviewed daily. Additionally, viewing the items in a holding location that has been emptied will show items that were not scanned.

Reconcile process errors: Many common processing errors (such as moving a box into the wrong size of location) are logged in the process errors report. Within the **Orders->Delivery Maintenance** module, the File->Reconcile process errors[673] menu option allows you to review any such errors and confirm that they have been fixed. Correcting errors soon after they occur and reconciling any process errors at the end of each shift provides an overall mechanism for ensuring process and inventory integrity.

Reviewing this report can also be useful in deciding whether certain practices should be reviewed or further training may be required.

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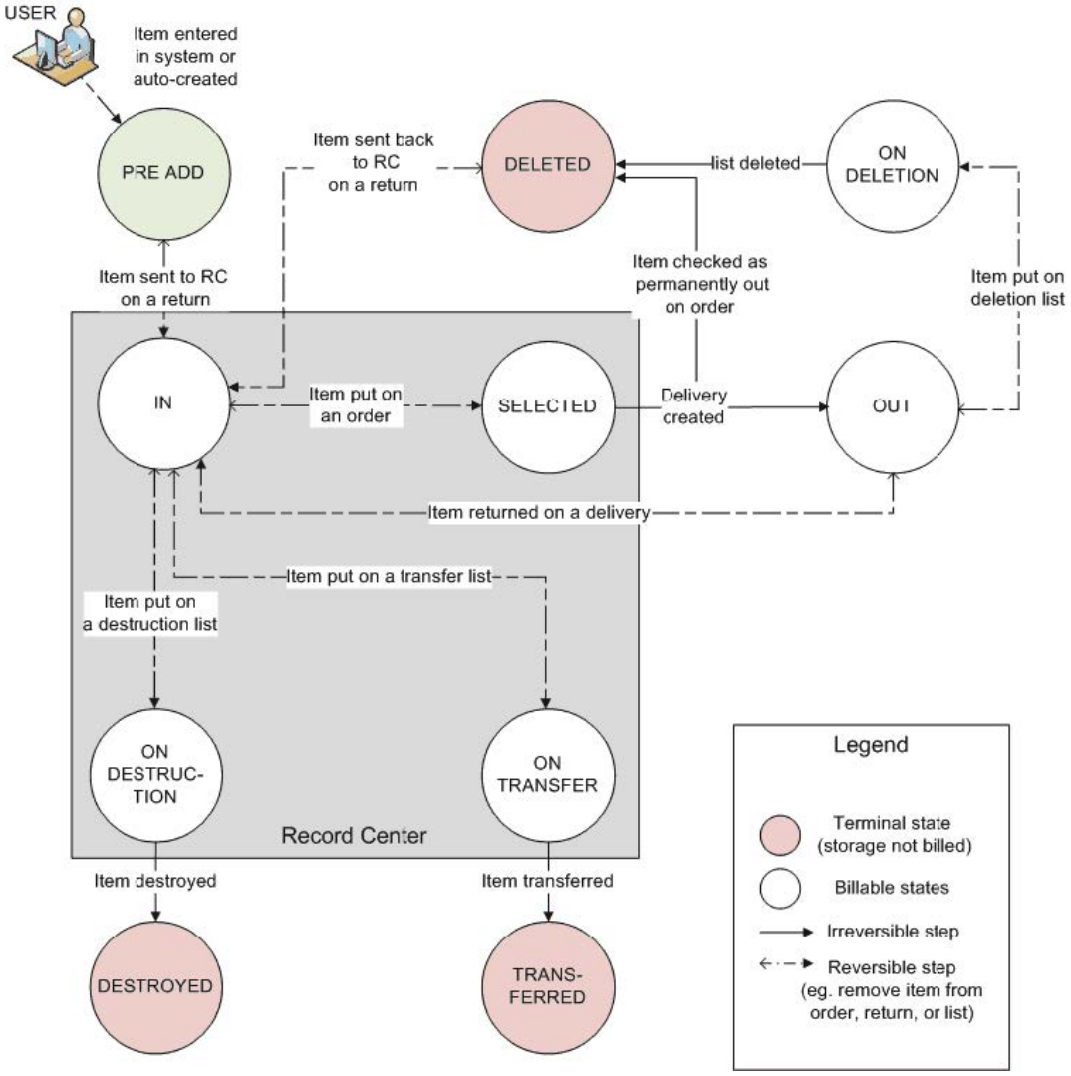
4.6 States associated with circulation of documents

The status of items in EDC will change as different things are done to them.



PRE ADD

For a customer that is not using the ActiveFile component of EDC, PRE-ADD is the state that items are typically created in. a record has been entered in the computer's inventory but the item has not been received at the off-site record center. No rent charges are applied for items in PRE ADD, and these are easily removed from the system.

Once the items arrive at the off-site center, their state is changed to IN and rent charges begin to take effect. A history of all boxes that have been in the record center is kept in the system .

IN

The item is at the off-site record center and is available for ordering.

SELECTED

The item is currently selected for an order but has not yet been shipped.

OUT

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The item has been ordered from the off-site record center and has not been returned. These boxes are considered part of the record center's inventory, and storage costs typically apply until they are removed from inventory through destruction, transfer, or deletion.

ON DESTRUCTION
The item is on a destruction list at the off-site record center. After destruction of the item, its state will change to DESTROYED.

ON TRANSFER
The item is on a transfer list. After the transfer, its state will change to TRANSFERRED.

ON DELETION
The item is on a deletion list (cancellation of space). After the item is processed, its state will change to DELETED.

DESTROYED
The item has been destroyed at the off-site record center. Storage fees are no longer applied.

TRANSFERRED
The item has been transferred to another storage center, or to another customer within the same record center. Storage fees are no longer applied.

DELETED
The item has been deleted, which implies that the space for the item at the off-site record center is canceled and will not be billed for. Boxes are generally deleted because they will not be returning to the off-site center. Storage fees are no longer applied. If the item is returned on a delivery, it will be returned to the IN state, and charges will once again apply.

Note:
When boxes are deleted from inventory, their records not removed but are simply marked as DELETED in the system. It is therefore possible to reactivate, them in the event that a customer returns items that they had marked as permanently out.

(See Outgoing and incoming items)143

5 Setting up your record center

The following topics relate to setting up the record center, or to expanding existing services. They will help you with your configuration. As long you understand the behavior of your system as it is configured, intimate understanding of these settings is not necessary for regular operations. For a discussion of procedures that can be used in creating your own operations manual72, please see the Procedures and training139 manual

In setting up your record center, you will define your standard operations and configure your system to match. DocuData will help you with this initial configuration and with changes to this configuration as your business develops.

Previewing this section will help you to prepare necessary materials and make operational decisions to

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ensure a smooth transition.

5.1 Prior to setting up

5.1.1 Operations manual

Every professional records management facility should maintain a current operations manual which includes both standard practices and special cases.

Some reasons for maintaining an operations manual:

- Consistently deliver your customers what you have sold them, ensuring that nothing is forgotten
- Train new employees as you grow
- Facilitate coordination and exception-handling by promoting consistency between employees and over time.
- Review procedures and discover ways to increase efficiency
- Maintain and even improve your level of service as you grow
- Learn from experience as an organization by documenting new and improved solutions and innovations
- Calmly plan for scenarios that could affect your business. (egg. operations manager cannot be reached)
- Achieve various industry certifications

(Note that you should also have a "disaster recovery plan". In addition to its practical value, this is also an important marketing document which many customers may wish to see for reassurance that their documents are in good hands.)

Building your operations manual

During your initial configuration and training, DocuData works with you to develop a work flow that is specific to your needs. You will want to document this work-flow as a starting point. Since every record center is different, the procedures described in this generic manual here will not be identical to those at your record center. However, identifying and tweaking the relevant topics from the Procedures and training manual 72 can help you to get started in creating your operations manual. Please also see our SOP templates online.

As you add new services such as imaging or shredding container rotation, we recommend finding the relevant SOP templates, reading the relevant section of the procedures manual and changing and adding details for your own companies needs. A good test of the document is to see whether someone unfamiliar with that particular procedure could complete it without assistance. This might require information such as where to find shredding bins, how to handle special clients, etc.

5.1.2 Considerations in converting to EDC RC from an existing system

Converting an existing record center to operate with your new software

Existing record centers that convert to EDC RC have existing inventory and data, and will have to take into account existing customer contracts and expectations. The data conversion process involves a close cooperation between DocuData and a record center representative who is familiar with the data and operations.

Inventory and locations:

The location of all items in inventory must be accurately translated from the old system into the new, though record centers will sometimes take advantage of the change in order to implement an addressing scheme that will increase picking efficiency as the record center becomes busier.

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If the location of boxes in inventory was known to contain inaccuracies, you may consider rescanning the inventory[404] in order to correct your inventory.

Other important considerations include:
Associating customer data into EDC fields
- Does the association enable your customers to easily identify and order their records?
- Do users have access to documents from the correct department?
- If the customer needs separate invoices per department, are storage and service charges correctly associated?

Service parameters:
Services in EDC RC are tracked through deliveries. When an order is placed, the delivery type - in combination with record center and customer delivery scheduling settings, determine how regular and rush deliveries are scheduled based on when they are placed.

The configuration of delivery types also affects how services are billed, and how they are processed within the work-flow.

5.1.3 Pre-training considerations

In configuring your EDC RC software, there are many decisions to be made and communicated. The following should be considered (and if possible, provided to DocuData) in advance.

Service parameters:

- What are your standard hours of operation?
- For regular deliveries, do you offer one or two cycles per day?
- When to orders have to be in by, to be included in the next delivery cycle?

- What other delivery types do you offer? (egg. 2-hr rush, client pick-up, by date, ...)
- What box types do you store?
- What do you intend to offer in terms of shredding and record disposal services?

- Do you wish to make use of two languages? This applies both to the RC software and to ActiveWeb. (Options include English-French, English-Spanish, English Dutch.)

Facilities and identity:

- What name and address would you like to have appear on delivery slips? What address would you like on your invoices?
- What are your logo and corporate color scheme?
  - Please provide a logo which is 300 pixels high by 426 pixels wide (1.42 ratio) logo in an uncompressed bmp format. This will be incorporated on delivery slips and invoices.
  - Please also provide a logo in jpg format for use on the login screen of your web page.
  - If you know the PMS numbers of the colors in your corporate color scheme, these can be used in creating marketing materials for your web services.
- Also, please have ready any URLs (web addresses), e-mail addresses, and phone and fax numbers

- Please provide what you have in terms of a floor-plan or racking layout.
- Do you have an existing box location addressing scheme? If so, please explain it.

Pricing

- Do you have a standard pricing agreement? If so, please provide details.

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- Do you have existing customer-specific contracts? If so, please provide details.
- (See Billable operations and pricing structure suggestions[74])

- What taxes apply?

Personnel

- Who will be involved in operating and supporting the record center, and what are their roles? (Sales, customer service, operations manager, drivers, accounting, IT support, etc.)
- Who will be present for training?
- How will those not present be trained?

Hardware

Please consider the availability of the following:

- Data server, web server, and workstations

(workstations with PDTs require a serial port, or an adapter to create one.)

- Thermal printer with ribbon and labels
- Laser printer (for delivery slips)
- Barcode scanner for computer input
- Phone or pager capable of receiving e-mail notification (for rush orders)
- Imaging scanner

5.1.4 Billlable operations and pricing structure suggestions

Billing in EDC works by allowing you to assign price codes to billable storage and operations. There are various billing methods possible, each with its own advantages and disadvantages. The following is a summary of key prices that can be assigned, using the most flexible customer configuration: "uses box types[253] ", and "by item type[253] " courier billing. Understanding these capabilities can help you to design your pricing structure.

Storage charges

Monthly Storage

- Regular storage charge (per box by box type)
- Vault storage charge (per box by box type)
- Open shelf file storage (per allocated linear foot)
- Minimum monthly storage adjustment

Storage is usually billed in advance, with adjustments for boxes added or removed during the period, but EDC RC does also permit billing in arrears.

Non-monthly storage

- Location rental charge: If you rent a specific location to a customer, you may assign a charge to be applied per location per storage invoice.
- Electronic data storage charge: Charge per megabyte of combined image and electronic document storage. (Note that this is charged per storage invoice, but expressed as an annual charge),

Service charges

Retrieval and re-filing charges

- Box picking (by box type)
- File picking (by box type)

- "Delivery type exceptions[731] ", for picking of boxes and files for specific delivery types (eg 2-hour rush. by box type and delivery type.)

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- Open shelf file picking

- Box re-shelving
- File re-filing
- New box accession (replaces re-shelving fee for new boxes. May be identical, or may be lower as a promotional strategy, or higher to include data capture fees.)
- New file into box accession
- Open shelf file accession

Delivery charges (physical deliveries)
- Per item delivery handling charge (per box type)
- Per item return delivery handling charge (per box type)
- Trip charge (per delivery type, may include a number of free item handling. ie, if 5 items are included free in the trip charge, the delivery or return charges for up to 5 items will be waived.)
- Fuel surcharge (per delivery type - typically the same though)
- Per address trip surcharge (rarely used - per delivery address)
- Transport container rental - if kept overnight by customers

Delivery charges (Fax and imaging)
- Per page charge
- Per delivery charge (may include a specified number of free pages)

Withdrawal and destruction fees
- Box deletion fee (space cancellation fee - per box type, for boxes that are not on site)
- Box disposal fees (various disposal methods - per disposal method per box type, should include all charges including picking)

Other fees
- Web access
- Other recurring charges (periodic invoice items)
- Box sale
- Re-boxing
- Other "line item" products and services.

5.2 Management and global record center set-up

This chapter will guide you through the initial set-up of your record center-wide parameters. Topics are introduced sequentially, so it may be easiest to view this chapter through the PDF document, which is distributed with your software and is also available through our website (www.docudatasoft.com) or support@docudatasoft.com. Many of the tasks described will be completed during your initial configuration and training with DocuData.

Topics:
Setting up new employees 76
Defining delivery cycles and business hours 76
Setting up service parameters and pricing structures (delivery types) 78
Configure system information settings 82
Setting up buildings, locations, and vehicles 86
Creating route templates
Configuring thermal labels 88
Customizing software text strings 89
Applying your logo for invoices and delivery slips 90
Setting rush order notification options 90

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Setting up your record center to offer shredding services[92]

5.2.1 Setting up new employees

Employee profiles are used to identify employees within EDC RC in order to accurately track who performed which operation, and to control access to modules, functionality, and reports in EDC RC. If a new employee replaces a departing one, the old profile should be retired by setting an end date on the Duration of employment, and a new one should be created.

Prior to setting up your first employee, give some thought to the different types of roles at the record center, and what type of access each role requires. In the Management->Employee Group[344] module, access rights for many of the roles at a record center may already be defined. You may add[345] or edit[345] employee groups if necessary.

To set up an employee:

1. Press the **Insert** key or click the **+** button to add a new employee record.
2. Enter their **last name**, **first name**, and if desired, a **login name** that they can use instead of selecting their profile from a list when login in. Most of the remaining fields are available for your reference, and can be filled or omitted according to the policies of your record center.
3. Select the appropriate **Language** setting if multiple languages are used at your record center.
4. Set the password expiration parameters. If the employee is not with you to choose a password, assign a temporary one, and select the option to "**Change next logon**".
5. Add access rights by clicking the **Groups** drop-down and adding roles. **Additional modules** are typically used for adding access rights that are specific to the individual and not the role.
6. If the employee requires Commission report access[705], check the corresponding check box.
7. Press **Ctrl-Enter**, or click the green check-mark to accept.
8. Press the **F7** key to print an employee bar code if they will log on to the PDT[762].
9. From the menu, select **Edit->Password**, and assign a (temporary) password.

The profile of your new employee is now ready for use.

Related topics

Overview (Employee)[338]
Overview (Employee Group)[344]

5.2.2 Defining delivery cycles and business hours

Next, we will consider the parameters that will determine when orders will be scheduled for delivery, based on the delivery type selected.

Delivery cycles:

The idea behind delivery cycles is that for greatest efficiency, your trucks will leave your record center on routes that may go to many addresses before returning to the record center. You may have two delivery cycles per day (AM and PM), or only one (see illustration below).

More urgent "by time" deliveries may be handled outside these regular delivery cycles - though it is not uncommon to add a rush delivery to a route as a vehicle is heading out.

Picking:

Picking is done by delivery cycle. When you create a picking list, the system will default to creating lists for the next delivery cycle to go out.

Picking times:

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EDC allows you to specify picking times. These are the times at which all regular orders for one delivery cycle have come in, and all subsequent regular orders will fall into the next delivery cycle. You may choose to do some picking before the picking time if you know that you have a lot of items to retrieve. However, this will generally reduce your efficiency as you may end up returning to aisles that you have already picked from as new orders come in.

(**Tip**: If you tell your customers that orders must be in by 11:00, we recommend setting your picking time to 11:05, to avoid arguments if their clocks are not synchronized with yours.)

Business hours:

Business hours affect delivery scheduling as well. With the exception of "24 hr" delivery types, orders placed while the business is closed (due to business hours or record center holidays) will be treated as if they had been placed at the time when the business is next opened.

For "By time" orders, only business hours are counted. For example, a 2-hour rush order placed one hour before the record center closes will be due by one hour after the record center re-opens.

Once a day delivery options:

When you offer only one delivery cycle per day, only the Afternoon picking time is considered. (The Afternoon picking time may be set to a morning time.)
With the "Same day" option selected, orders placed before the (morning) picking time will be picked and delivered that day When it is not selected, orders in by the (afternoon) picking time will be picked that day and delivered the next day.

Customer-specific settings:

Although we recommend keeping your operations as simple as possible, business hours, picking times, and "once a day delivery options" can all be overridden per customer.

Customers can also enter customer-specific holidays. A customer holiday prevents a delivery from being scheduled for this customer on the specified date. It does not interfere with picking at the record center.

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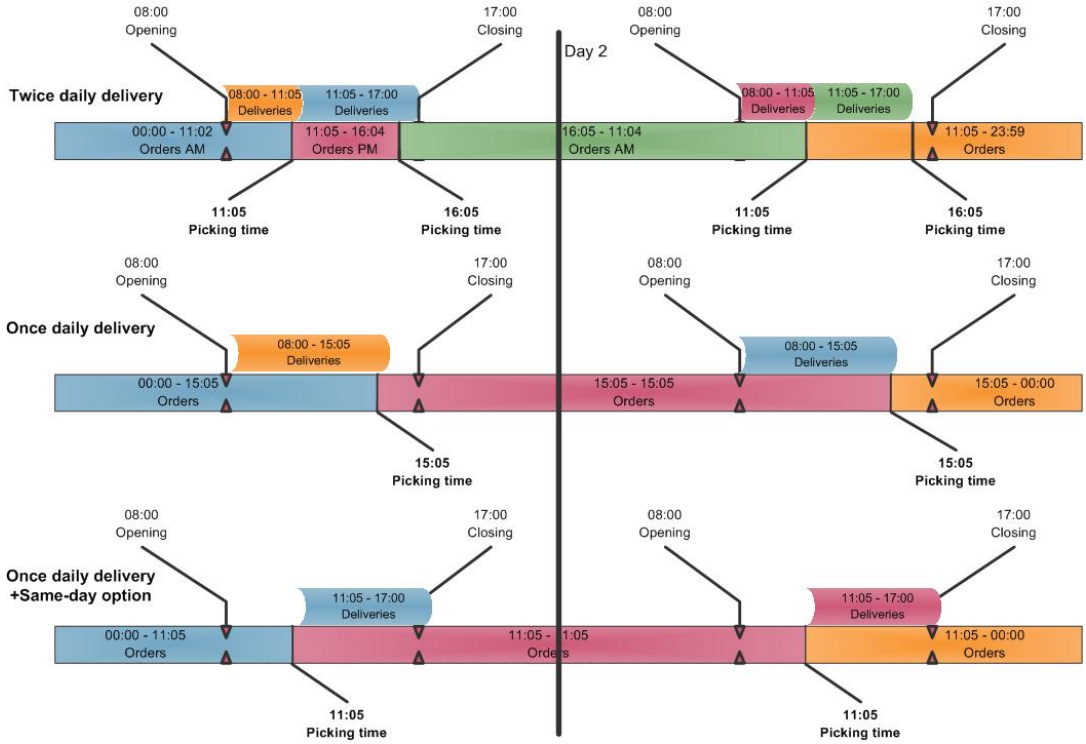

Note: A next trip[45] ship mode is also available. With this shipping mode, picking cut-off times are not enforced by the system.

Related topics:

Setting up service parameters and pricing structures (delivery types)[78]
Configuring system information settings[82]

5.2.3 Setting up service parameters and pricing structures (delivery types)

Before setting up your record center, you will have some ideas about what services you will offer and how you will bill for them. In EDC RC terminology, services are Delivered to customers. The parameters of these deliveries are configured in the Delivery type[722] module and depend on your delivery cycles and business hours[76].

Determine which delivery types you wish to offer

Delivery types are defined in the Accounting->Delivery Type[723] module. EDC usually comes with some pre-defined delivery types that you can configure for your own use. You can also add more delivery types, if you want to offer additional services. EDC allows you to control which delivery types each customer and authorized user has access to, so it is possible to have delivery types that are defined but not offered to customers. Before allowing access to delivery types you will want to ensure that the delivery type is properly configured.

First, we will consider the **Ship mode** of each delivery type that you wish to offer. This affects the scheduling.

- **Regular** deliveries are scheduled according to the delivery cycle. Orders accepted before the picking cut-off time will be picked, and then delivered in the following valid delivery cycle - taking into account holidays and other settings. (note that with settings at the bottom of this module, it is possible to limit a regular delivery type to specific week days only.)
- **Half day rush** can be used by record centers that only deliver once-daily (and to accelerate the

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delivery. It sends a notification e-mail when an order is accepted so that items can be picked immediately and delivered with the regular deliveries one day earlier than it would otherwise be. (i.e, the same day if the picking cut-off has not passed, and the following day if it has.) - This option is not widely used.

- **24-hours** is used for after-hours and holiday deliveries. Schedules deliveries by time based on the **deliver within** setting, ignoring business hours and holiday schedules. If a record center does not offer service outside business hours over the web, since it is possible to turn e-mail notification on or off with this delivery type.
- **By time** also schedules deliveries based on the **deliver within** setting, taking into account business hours and holidays. Thus, if a by time order do be delivered within 2 hours is placed only one hour before closing, it will be deliverable by 1 hour after the record center re-opens. E-mail notification is sent out with by time orders. If an order that is not deliverable until the next day is placed online, the customer is warned before the order is accepted, allowing them to select a different delivery type if necessary.
- **By date** delivery types allow you to schedule deliveries for a future delivery cycle. Unless the bypass by date order check[366] option is turned on (which is dangerous!) by date orders cannot be placed for holidays or for dates that would be delivered earlier than a regular order placed at the same time.
- **Next trip** delivery types are used in situations where the usual picking cut-off times and delivery cycles do not make sense. These might be used for customers that receive more than two deliveries per day, for drivers that have irregular delivery times and do their own picking, or for non-urgent deliveries on distant delivery routes that require a special trip. (A record center should clearly understand how they wish to use this ship mode, to ensure that there is a mechanism in place to ensure that nothing gets missed.)

Next, we will consider the **Courier** option. This will affect how the goods or information are delivered to the customer.

- **Record Center** is the traditional delivery method. Such deliveries may be included on your truck routes and involve your drivers going to the delivery address to drop off and pick up items.
- **Imaging** deliveries are performed using a document imaging scanner instead of a truck. They are performed[178] through the imaging on demand[635] module, and customers receive an e-mail notifying them that they can view their requested images on ActiveWeb as soon as the delivery is completed.
- **Fax** deliveries consist of faxing information from the requested files to the customer. The work-flow in EDC is quite similar, though you will be required to manually enter the number of pages scanned whereas imaging deliveries are able to count the number of pages automatically.
- **External** courier is used for physical deliveries that do not go on delivery routes. One example might be if you have a commercial courier pick up or drop off items for a particular customer. Another might be if the customer were to come to the record center to pick up or deliver items.

The **Record center only** option makes a delivery type available for orders placed through EDC RC, but not available for selection by the customer for orders placed online. This is commonly used for special and "no-charge" delivery types, used for purposes such as capturing charges for work done on behalf of the customer around the record center, providing a service that the customer can only order indirectly (such as tape rotations) or for waiving charges on a delivery due to special circumstances.

The **Ordering** setting determines the order in which delivery types appear in lists. Those with lower numbers will appear higher on the list. You will probably have a Regular delivery type as #1, whereas an 24-hour delivery type may be #99, as you will not want such an expensive option selected accidentally.

Finally, the **Price Code**, **Return price code**, **Trip Charge**, and **Fuel surcharge** settings relate to billing. Each of these accepts a price code, which must be defined in the General Pricing[734]

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module.

- **Price Code:** For imaging and fax delivery types, this is the per-page charge. For other delivery types, whether and how this setting is used depends on the customer's courier billing setting[253] .

Courier billing option	Price code applied
Delivery	Once per delivery
Container	Once per outgoing container*
Item	Once per outgoing container*
Round trip item	Once per container per direction
By Item type	- Not used - (pulled from box type)
Item type round trip	- Not used - (pulled from box type)

- **Return Price Code:** For delivery types that are not imaging or fax, whether and how this setting is used depends on the customer's courier billing setting[253] as follows:

Courier billing option	Return price code applied
Container	Once per returning container*
Item	Once per returning item

- **Trip Charge:** This is applied once per delivery. For customers that use By item type or Item type round trip courier billing, it is possible to have this trip charge include a specified number of items (either the most or least expensive) free of charge (this can be seen in the general pricing module).The trip charge price code will typically differ from one delivery type to the next, though regular and by-date delivery types will frequently use the same price codes, so that orders of these delivery types can be grouped onto the same deliveries.
- **Fuel Surcharge:** This can apply to physical deliveries. The same price code is typically used for all delivery types, allowing the record center to adjust a single price code in order to compensate for fluctuating fuel prices.

System delivery types

In addition to delivery types for services ordered directly by customers, the system also requires delivery types for capturing specific types of charges. The delivery types themselves will be "no charge" - with $0 price codes for the "price code" field, trip charge, and fuel surcharge.

Delivery type	Ship mode	Courier
Box change delivery type	Regular	Typically external
Scheduled order delivery type	By date	Record center
Withdrawal list delivery type	Regular	Typically external

To set up these delivery types you will require price codes. See setting up delivery types[103] and configuring EDC for invoicing[98]

Related topics

Overview (Delivery Type)[722]
Overview (General Pricing)[734]

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5.2.4 Delivery types and Scheduling

Record centers offer their customers multiple options for deliveries. Premium delivery types ensure that customers always have access to their items, for a price. Regular delivery types permit the record center to operate efficiently and pass savings on to their customers.

Ship mode	Notification E-mail	Batch Picking	Behavior and comments
Regular	No	Yes	An order placed before the picking cut-off time will be picked following the cut-off and delivered in the next delivery cycle to go out.
By date	No	Yes	Orders are placed for delivery in a future delivery cycle. Unless the bypass by date order check option*** is turned on (which is dangerous!) by date orders cannot be placed for holidays or for dates that would be delivered earlier than a regular order placed at the same time. not widely used
By time	Yes	No	This is also knows as a business-hours rush. The delivery must be fulfilled within the specified number of business hours. Business hours are defined for the record center in the system information module, but may be overridden per account in the customer information module. Notification e-mails are sent to record center employees when a rush order is received.
24 hours	Optional	No	This is also know as after-hours and holiday rush. The delivery must be fulfilled within the specified number of hours, without regard for business hours. Many record centers do not make this available to be placed online. The client must call an emergency number to request this type of service.
Half day rush	Yes	No	A notification e-mail is sent when a half-day rush order is received. The idea is that the picking of the items can be expedited so that the delivery can be performed with the regular deliveries, one delivery cycle earlier than it would be based on the picking cut-off time. This option was intended for record centers configured with one delivery cycle per day, not deliverable on the same day. (Not widely used.)
Next trip	No	Yes	With this ship mode, picking is initiated by the creation of a picking list for a delivery route rather than by the passing of a system-enforced picking cut-off time. This may be useful in a variety of different situations, including customers that receive more than two deliveries per day, for drivers that have irregular delivery times and do their own picking, or for non-urgent deliveries on distant delivery routes that require a special trip. (A record center should clearly understand how they wish to use this ship mode, to ensure that there is a mechanism in place to ensure that nothing gets missed.)

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5.2.5 Configuring system information settings

The Management->System Information[364] module contains many parameters to tailor the behavior of EDC RC to the needs of your specific record center. Some of these settings must be set for your record center once, and will likely never change. For many of the other settings, the default values are appropriate, but it is good to know that other options exist should you wish to alter the behavior.

Once again, DocuData will go through these settings with you during your initial set-up, and support is available via our support portal and support@docudatasoft.com.

Open the system information module in edit mode.

1 Click on **Management->System Information** from the Main window.
2 Click on **Edit->Edit**.

General settings:

Field	Suggestion	Notes
Date mask		Regional setting
Default Box Volume	1.0 or 1.2	Depends on whether box volume is tracked in cubic feet or standard boxes
Bypass volume check	No	
Location on file out labels	?	Can be useful for re-filing if boxes rarely move
Bypass by date order check	No	Dangerous. Used temporarily, for backdating.
Add file to PRE ADD boxes	No	Except for imaging boxes that do not have inventoried files.
Bill full month add / del default		No if you prorate storage
Show user module on Web		No if you collect signatures for all users authorized to place orders
Default file out cards	Yes	
Storage Credit Default		Yes if you pro-rate storage
Paper Type		Regional setting
Number of Return Slips to Print	0	
Print Picking Labels	Yes	
Number of Invoices to Print		2, if you mail a copy and file a copy
Print Refile Errors		Can be useful in training and when using temporary workers

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Field	Suggestion	Notes
Number of Delivery Slips to Print	1 or 2	Depends on delivery options
24 hour paging		Yes if customers may place after-hour orders online
Print Excluded Items		
Hard copy Invoice	0 or 1	1 if you want a print copy of electronic invoices
New label on box accession		No if you issue pre-printed labels to customers, otherwise Yes
Low disk space warning (MB)		You would increase this value to warn you earlier if you have many customers uploading images and electronic documents.
Box Chg delivery type 78		A no-charge regular type to capture re-boxing charges
Scheduled order delivery type 78		"Tape rotation" or "By Date" - depending on whether you want tape rotation orders to group with regular and by date orders
Withdrawal list delivery type 78		A no-charge regular type to capture deletion, disposal, and transfer charges

***Replication**

Field	Suggestion	Notes
DocuData RPC server		services.docudatasoft.com :443
RPC server at RC		External address (URL) for ActiveFile replication
Internal LAN		Internal address for RPC server used for ActiveFile replication
Web RPC server		Internal address for RPC server used for ActiveWeb

Locations

The location mask indicates which characters (alpha/numeric) are allowed at each position.
The location mask defines the sequence of characters that can be a valid location address at the record center, as well as how this address is interpreted. This is selected in consultation with DocuData, and not changed once it has been set.

In general, the mask should have the following characteristics:
- Easy to interpret in the record center
- Long enough to clearly encode all of your locations, but short enough to fit nicely onto bar codes, and to type into the PDT by hand if necessary.
- Flexible enough to accommodate different types of locations, including regular storage, transit

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locations, and holding locations used for sizing boxes upon arrival.

A typical mask might be "!-!!-!!!!-!!!", where "!" represents any character, forced to uppercase. (more details on what different characters in a mask mean are available with the definition of mask criteria[866] in the glossary).

Field	Suggestion	Notes
Location Mask	!-!!-!!!!-!!!	
Building Length	1	One character ; Building number (or letter)
Floor Position	3	Typically the floor or picking level
Floor Length	2	

The location mask always starts with a building code, which will typically be one character long, depending on the setting used for the Building Length field. This is associated with all locations, including transit locations, for that building.

Next is the "**Floor**", which is now more commonly referred to as the **picking level**. The picking level can be used to efficiently divide picking into multiple lists based on location. Picking and refiling lists on the PDT display the picking levels that they include items on, as well as the type of items and total number. We typically suggest a floor length of 2, which gives you the flexibility to use mnemonics (such as HO for holding, TR for transit, PA for pallet, DE for demo, 01 for first level, 02 for second...), yet is not excessively long, which would make it harder to read and type.

The remainder of the mask is essentially free-form. The two things to keep in mind are
1. EDC will sort your picking path alphabetically. This means that characters to the left are "most significant", while characters to the right add finer levels of detail. It also means that you will want to put the lowest location addresses further away from the your staging area, in order to minimize the distance that you are transporting a full load of items. (Go out with an empty cart and fill it up as you return towards the staging area.)
2. It should be easy to look at a location and figure out whether you are in the right Aisle, Bay, Shelf, and Position.

A typical location addressing scheme might be

B-LL-AAbb-SSP

Where

B=Building
LL=Picking level
AA=Aisle
bb=Bay (section)
SS=Shelf
P=Position

Note that if in some regions of your record center you have more positions and fewer shelves, you may switch to -SPP, using once character for the shelf and two characters for the position. This will still sort correctly for the picking order.

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Location type	Scheme	Notes
Shelf storage	B-LL-AAbb-SSP	See above
Holding locations (temporary, for sorting/sizing incoming boxes)	B-HO-SIZE-NNN	HO = Holding (HO) SIZE = box volume (0100) NNN = Number (001, etc)
Transit locations (Used in deliveries, these locations accept any number of files and boxes of any size) (Defined[354] in the building module[353])	B-TR-XXXX-NNN	TR = Transit (TR) XXXX = 0000 for default = VEHI for vehicles = FILE for file sorting NNN = Number (000,001 etc) XXXX-NNN = IMAG-ING for imaging location
Pallet storage locations	B-PA-SIZE-NNN	PA = Holding (PA) SIZE = box volume (0100) NNN = Number (001, etc)
Demo locations (For training and testing new procedures)	B-DE-XXXX-XXX	DE = Demo picking level. These locations might not actually exist.

Examples
1-01-0102-031: Building 1, shelf location on picking level 01, aisle 01, bay 02, shelf 03, position 1
1-TR-0000-000: Building 1, default transit location
1-TR-VEHI-001: Building 1, transit location associated with vehicle 001
1-TR-FILE-001: Building 1, file-sorting transit location 1
1-HO-0100-001: Building 1, holding location 001 for staging size 1.00 boxes
1-PA-0100-001: Building 1, long-term pallet storage of size 1.00 boxes, pallet 001
1-DE-0101-011: Demo location, used in training and testing.

Related topic - Set up buildings and transit locations[86], Setting up storage and holding locations[93]

Field	Suggestion	Notes
Tax calculation, GL codes, agency...		Speak with your accountant
Imaging, documents directory	port 11000	Speak with your network administrator
SMTP settings		Create a login and password for EDC RC to use.
Record Center information		Will be used on delivery slips
Invoice email BCC | Reply to		Confirm that electronic invoices went through
Billing address		If blank, RC address will be used on invoices
Alternate bar code lengths	None	Required for moving items using alternate (competitor) bar codes with PDT.

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5.2.6 Setting up buildings, locations, and vehicles

Once the location mask has been defined in the system information module[82], it is possible to start defining locations necessary for tracking boxes and files. This is done in the Building[353] module, where we can configure parameters for the existing building and add more record center locations if necessary. (The creation of other locations such as holding and storage locations[93] will be covered in the section on setting up for managing inventory.)

1. Open the **Management->Building** module.
2. From the menu, select **Edit->Add|Edit**.

Field	Suggestion	Notes
Building	egg. "1"	Must match building length of location mask
Description		Often the city or street name of the facility

Transit Locations

Transit locations are temporary locations where items may rest before going to a permanent location. They may hold any number of items and any size of box. Examples include delivery vehicles, receiving and shipping areas, and bins used for collecting files for re-filing in batches. (**Note:** Pallets for transfers and destruction are not considered transit locations, as they can only hold pre-determined boxes, and are not re-used.)

Create transit locations as follows:

From within the building module in edit mode:

1. Click the **Transit Locations** drop-down box. A list of transit locations appears.
2. If the location that you wish to create does not already exist, click the **Add** button. A window appears
3. Enter transit locations (starting with the building code) and description. (See the table below for suggestions), then click the **OK** button.
4. Repeat until all desired transit locations have been entered.

The following are common types and examples of transit locations, using the default location mask[83].

Transit location	Examples	Notes
Default transit location	1-TR-0000-000	
Shipping	1-TR-SHIP-ING	
Imaging	1-TR-IMAG-ING	
Delivery vehicles	1-VEHI-001, 2, etc	
Receiving	1-TR-RECE-IVE	
File sorting	1-TR-FILE-001,2,etc	

Field	Suggestion	Notes
Multiple Transit Locations		If this is set to NO, the system will use the default transit location rather than prompting for it, for

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Field	Suggestion	Notes
		operations such as returning items through the software, and imaging on demand.
Statistic threshold	15 minutes	Not widely used. See reference manual 355.
Alternate location label on pick list		Applies to record centers converting to EDC.
Tax A, Tax B	%	According to local tax rates
Address		
Contact		

Associated Buildings

When an association is created between two buildings, regular picking list creation and delivery creation done at one building will include items and deliveries at the other buildings as well. (Note that Pick and Run for rush orders is still building-specific).

This is usually done as a temporary measure when one of the buildings is only partially staffed and items are moving from one to the other. If two separate facilities are always run by the same staff, it may be better to set these buildings up as separate picking levels of the same "building" in EDC.

- To associate buildings, click the '**+**' button and select the associated building from the list.
- When you are done editing the building information and adding transit locations, press **Ctrl-Enter**, or click the green check mark.

Printing transit location labels

Printing off transit location labels will permit you to label file sorting bins and provide your drivers with truck bar codes for scanning returning items to.

1. If you are not already in the building module, open the **Management->Building** module.
2. Click on **File->Print transit location labels->Thermal**. A window appears.
3. Enter an interval of locations and press **OK**. The labels will be printer on the thermal printer.

Note : Within the range specified, this function will only print transit locations. It will not print labels of regular storage locations.

Setting up Vehicles

In EDC, a vehicle is simply a vehicle description, associated with a transit location. Vehicles are used in creating delivery routes.

To add new vehicles for the vehicle transit locations that we have just created:

1. Open the **Management->Delivery Vehicle** module.
2. Click the green '**+**' button.
3. Type in a description of the vehicle that will be meaningful to you
4. Select or type a transit location
5. Press **Ctrl-Enter** when done.
6. (Repeat for all vehicles)

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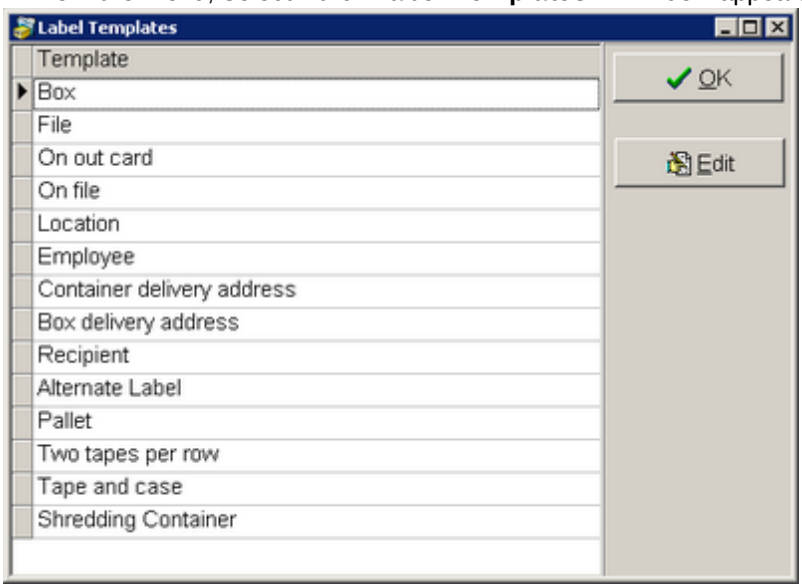
5.2.7 Configuring thermal labels

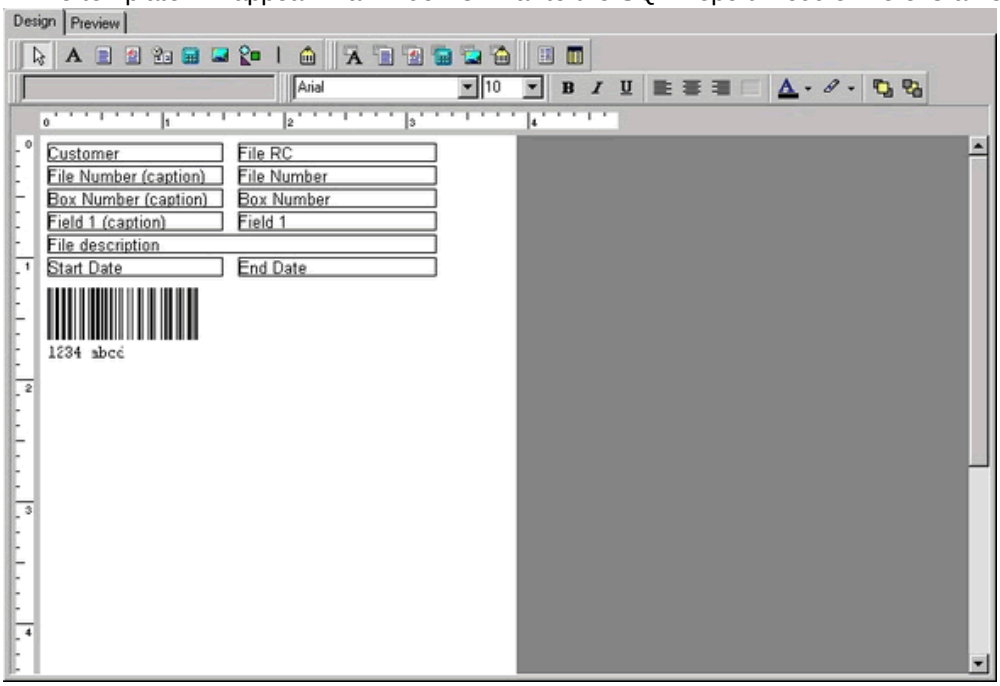
EDC RC comes pre-configured for printing most thermal labels on 2" high by 4" wide label stock. Tape labels are pre-configured to 0.5" high by 2 labels of 1.5", side by side.

These labels can be modified using the same built-in report builder used by the Inventory->Report module. This gives you great flexibility to modify the text, graphics, and fields present[505].

1. Open the **Management->System Information**.
2. From the menu, select **Edit->Label Templates**. A window appears.



3. Select the template and double click on it or click the **Edit** button.
4. The template will appear in a window similar to the SQL Report module. Here is an example :



5. The information can be deleted, modified (size or text format) or moved. For more detailed information concerning the modification of label templates, see the Working with the design tab[505] topic.

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- To save a template externally select **File->Save As**,and enter a name and location for the exported file.
- To import an externally saved template back, select **File->Open**, and navigate to the label template to open.

(You will have to modify **File->Page set-up**, as this is not saved with the template.)

6. When all the changes have been performed, close the window. The system will prompt you to save the changes. To save the changes press **Yes**.
7. If you have no more templates to edit press **OK**.

Related topics:

Printing bar code labels 465
Overview (Report SQL) 501

5.2.8 Customizing software text strings

The terms used by your software are managed using the Inventory->Dictionary module, which enables you to modify them if necessary. You have the flexibility to override how a string appears for a specific client, and you may also indicate in the general dictionary that a specific string should appear differently for tape-only accounts.

Certain strings will need to be modified:

1. Press **Ctrl-K** and set the search index to Number.
2. Press **Ctrl-F** to enter the string number to search for.

Term	String #	Description
RC Name	651	Will appear as the default "Return to" value for newly created customers. This appears on box labels.
Default City	1013	Used e.g. in creating new delivery addresses
Default State	1014	(see above)
Tax A Name	1670	The name of your first tax, as it will appear on the invoice
Tax B Name	1671	(see above)
Tax A Number	2483	String appearing at the end of the invoice
Tax B Number	2484	(see above)

3. Press **Ctrl-Enter** to go to the string.
4. Press **Ctrl-E** to edit the string. Make any modifications.
5. Press **Ctrl-Enter** to accept changes.
6. Press Ctrl-F to search for and modify the next string.

Note: For each session of EDC, the dictionary strings are loaded when you log into EDC. Therefore, before you can see the changes that you have made, the dictionary must be refreshed. You can accomplish this by exiting and restarting EDC RC, or by switching the language to French and then back to English (from any module window, **Help->Change Language**, select French, **Aide->Langue**, select English).

Optional: Switching login screen messages to English only:

Certain strings in the default dictionary contain terms in two different languages, to communicate with users who have not yet identified their language preferences by logging in.

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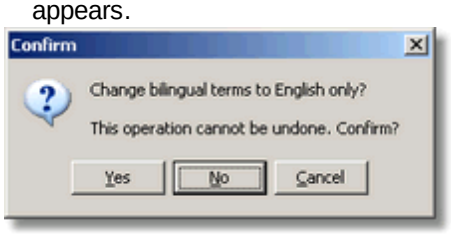
Record centers with customers that communicate in a single language may wish to eliminate the use of the second language in the interface as follows:

1. Open the **Management->Dictionary** module
2. From the menu, select **Edit-> Change bilingual terms to English | French only**. A dialog box appears.



3. To confirm the change, click **Yes**.

Note: This will not affect strings that have previously been altered by the record center in the dictionary.

Related topics:

Modify terms used in EDCRC[361]
Commonly modified dictionary strings[852]

5.2.9 Applying your logo for invoices and delivery slips

Your logo will appear on delivery slips and invoices. The logo file, rclogo.bmp, is located in the data directory of EDC RC. Rename your logo to rclogo.bmp in order to replace the existing image, which can be found in the data folder of your EDC RC installation. This image file needs to be of an uncompressed BMP format. Also it needs to be 300 pixels high by 426 pixels wide (1.42 ratio).

EDC will stretch or reduce the logo to match the above size, it will look odd if it is not in those proportions. If the image is smaller it will look pixelated as a result of the being stretched and if it is larger it will be unnecessarily large. It is preferable that the image file be as small as possible (it usually makes the printing faster); since you will normally be printing in black and white it would be better to have a black and white logo.

Note that this will not affect invoices that use custom invoice templates[380], on which you may use any logos that you wish.

5.2.10 Setting rush order notification options

Paging options determine who receives notifications for urgent orders, and when. The first notification is sent immediately to initiate picking and the recall of delivery vehicles. If picking is not started or completed within specific time limits, notices may be sent to additional email addresses.

The orders for the following delivery types will lead to the following notification behavior:

Delivery type ship mode	Notification
By time	Yes, within business hours + paging margin[372]
24 hour	Any time, if 24 hour paging[369] = yes
Half-day rush	Yes, within business hours for picking

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Notifications are sent through your e-mail provider based on the SMTP settings[374] in the system information module. If you change providers or change the password on the account that EDC uses, you will have to update this information.

These notifications are sent by a service or component of EDC called the order monitor, which runs on a server. Because you could miss an order if this is unable to send e-mails, you will typically have a component called "Order checker.exe" running on one or more busy workstation, the function of which is to sound an alarm if the order monitor encounters difficulty.

To specify notification messages, recipients, and time thresholds for warnings:

1. Open the **Management->Buildings** module.
2. Press **Ctrl-E** to enter edit mode.
3. Fill in the options. For more details, see Pager options[358]
4. Click the green check mark to accept changes when done.

5.2.11 Working with multiple buildings

EDCRC supports operation with multiple buildings, with separate rush order paging, picking lists, disposal lists, and other tasks.

The decision of whether to set up two nearby physical buildings as separate buildings in EDC will depend on how you wish to operate. If operations between the two buildings then it is often best to simply set them up as separate picking areas of the same building in EDC.

On the other hand, if you open a second location that is more distant and will eventually be separately staffed, then you will want to set them up as separate buildings, but use the associated buildings functionality, associating the second building to the first one so that when you create picking lists for the first building, you will also a second picking list for anything that is required from the second building, without having to log in a second time.

Steps:

1. Determine that you wish to have separate buildings rather than just picking areas.
2. Create the second building, adding transit areas as well as rush order notification contact information.
3. Optionally, associate the second building to the first until the second building is fully staffed.
4. When setting up shortcuts for logging in from additional buildings, be sure to specify the correct building to access, using the dc.cfg configuration file.
5. In customer information, indicate what service building to use for an account and whether or not their items should be limited to that building.
6. In the delivery address module, set the service building if necessary. This will affect requests such as pick-ups and line-item requests, where the source building cannot be determined based on the current location of the items (as it would do with box or file requests).

Handling situations:

If a file is picked up and returned to the wrong building (i.e. the box is in the other building), you will receive a warning on the return. This happens most often when two buildings are in the same city, in which case record center typically have one vehicle to a trip between the buildings on a daily basis or as required.

It is possible to add a delivery from one building onto a route from the other building. In this case, EDCRC will warn you but will permit you to do it.

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5.2.12 Setting up your record center to offer shredding services

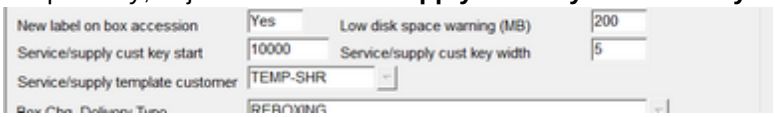
In the Customer->Customer Information module:

- Create an account to use as a service-only template account[124]

In the Management->System Information module:

In the General section:

- Set the Service/supply template to the account created above.
- Optionally, adjust the **Service/Supply cust key start** and **key width**.

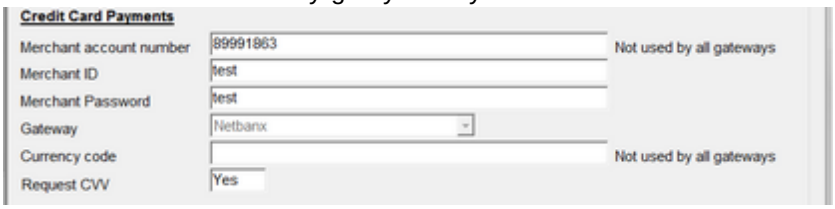


In the replication section:

- If you wish to use route optimization, obtain and enter a MapQuest API key. (Contact support@docudatasoft.com if you require assistance.)

In the Credit Card Payments section

- If you wish to process credit cards with rcMobile, select one of the providers listed in the Gateway field
- Enter the values that they give you for your account.



In the shredding section:

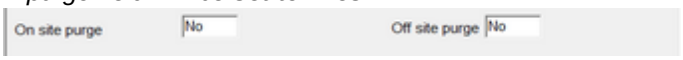
Adjust the business hours that apply to your shredding vehicles if necessary.

In the Management->Delivery Vehicle module:

Configure your vehicles[349] that can be used for shredding service.
You will need to enter the weight capacity for the vehicle and whether it does on site, off site, or both.

In Accounting->General Pricing:

- Set up any price codes that you wish to have available for on site purge and off site purge.
- Note that these must be two separate sets of price codes if you offer both, since on site is typically more expensive.
- See Fields (General Pricing)[735] and Adding or editing a price[739]. Either the *On site purge* or *Off site purge* field will be set to "Yes".



- If you have you will be adding addition shredding container types[739] for periodic emptying or rotation, you may wish to add price codes for that as well.

In Inventory->Shredding Container:

- See Setting up shredding container types[105]
- Label your containers so that you can scan them.

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5.2.13 Customizing ActiveWeb

When users log into ActiveWeb, they see the home tab which includes an announcement page. Using the following instructions, you may configure a default announcement for the record center, as well as customer-specific announcements. These announcements can include any valid HTML, including text, images, and links (for example, to download documents).

The announcement page

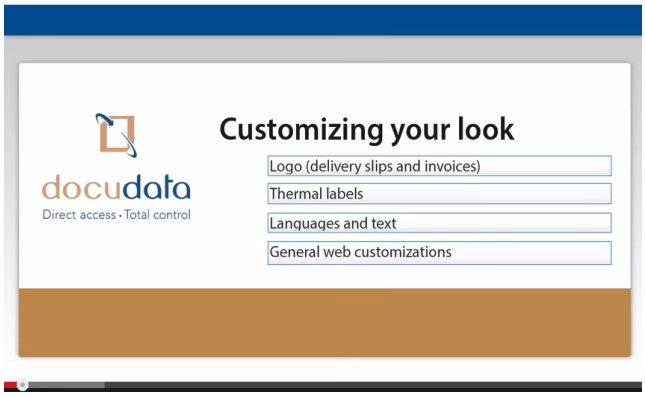
:The announcement page appears on the first screen (home
page) after a successful login. The announcement page is located in the "data" folder of your EDC installation. There are 2 of them by default:

ActiveWebHomeEn.html -> used for English language
ActiveWebHomeFr.html -> used for french language (or other languages depending on the language you use)

The announcement page can have any valid HTML within it (images included). Just
remember that the images need to be referenced from the "images" folder of the web application just like described for the login page above.

To make a custom one for a customer, copy this file in the same folder and renaming it with the customer key as follows:

ActiveWebHomeEn_demo-a.html (for the English page for customer with key "demo-a")
For more detailed instructions please see the following video.



5.3 Inventory

5.3.1 Setting up storage and holding locations

We have already considered the general addressing scheme in setting the location mask 83 for the record center. We have also created transit locations 86. Next, we will create holding and long-term storage locations.

Holding (sizing) locations
Holding locations are temporary locations that boxes may occupy before being transferred to a long-term storage location. They have a specified unit size. Therefore, any box that has not yet had its size confirmed at the record center will be "sized" when it is first scanned to a holding location.

The work on a delivery is not complete until an item is moved to a long-term storage location. Therefore,

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moving box to a holding location does not cause the item to become Verified. The overall delivery does not go to the Verified state until all boxes on it have been moved to permanent locations and all files have been re-filed (or have gone out on a new delivery).

Record centers frequently affix the labels for holding location to small soccer or traffic cones, which they keep in the receiving area. Once boxes have been scanned into the record center, they are sorted by size for shelving. The items are scanned to a cone (holding location) of the appropriate box size. The cone sitting on top of a pile of boxes can serve as an indication that it is ready to be put away.

Then, once the holding location has been emptied, it is easy to bring the cone back to the computer to verify that no boxes were missed while scanning items to the shelves.

Location type	Scheme	Notes
Holding locations (temporary, for sorting/sizing incoming boxes)	B-HO-SIZE-NNN	HO = Holding (HO) SIZE = box volume (0100) NNN = Number (001, etc)
Pallet storage locations	B-PA-SIZE-NNN	PA = Holding (PA) SIZE = box volume (0100) NNN = Number (001, etc)

Note that while busy record centers may use wooden pallets for holding boxes in a holding location, a holding location differs from a pallet location in that a "Pallet storage location" is considered a long-term storage location, and a holding location is not.

To create holding locations:

1. Open the **Inventory->Location** module.
2. From the menu, select **Edit->Add**.
3. Fill out the fields as follows:

Field	Suggestion	Notes
Location	egg. 1-HO-0100-001	example is first holding location for boxes of type 1.00, in building 1. (Your scheme may vary)
Alternate label	(blank)	
Unit Size	egg. 1.00	This relates to the box type
All Sizes	No	
Capacity		Make it big enough that you are not likely to get boxes rejected. In practice, a holding location might contain the number of items that you would expect to put away in a re-filing operation. (egg. a cart-load or a pallet)
Vault		"No", unless this is for items requiring vault storage.
Holding	**YES**	
Customer = All	True	

4. Press **Ctrl-Enter** to accept the first location. The location will be added, and the Location module will create another identical record, opened in Edit mode, with the cursor positioned to the last character of the location.

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5. Make any modifications to create the next location (E.g. if the first one was 1-HO-0100-001, and you want to create a second location for this box type, change the last digit to "2") and press **Ctrl-Enter**.
6. When you are done creating holding locations, hit the "**Esc**" key or click the cancel button.

To print the labels:
1. Press **F7**. A dialogue window prompts for a range
2. Enter the range of locations to print, and press **Enter**.

Pallet storage locations
Pallets are sometimes used for storage, for example if sufficient racking is not available, or if the items are likely to be moved again and picking efficiency and storage density are less of a concern for these items at this time. Pallet storage locations are usually created in the same manner described for holding location, but with the following settings:

Field	Suggestion	Notes
Location	egg. 1-PA-0100-001	example is first pallet location for boxes of type 1.00, in building 1. (Your scheme may vary)
Alternate label	(blank)	
Unit Size	egg. 1.00	This relates to the box type
All Sizes	No	
Capacity		Pallet size.
Vault		"No", unless this is for items requiring vault storage.
Holding	NO	
Customer		Under some circumstances, you may wish to make a pallet customer-specific.

Pallet storage location labels may also be affixed to a cone placed on the pallet.

Rack storage locations
The majority of your box and storage locations will be on racking. In setting up these locations, the primary considerations are:
1. To make it easy to locate a locations, and
2. To establish an efficient picking path.

Guidelines for efficient picking
For picking, EDC will guide you in through the locations in alphabetical order. Therefore, we suggest the following tips:
1. Make your first location far away from your staging area, in order to carry the maximum number of items the least distance.
2. Label aisles rather than rows so that you don't end up walking the same aisle twice when picking adjacent rows.
3. Within an aisle, you may wish to consider two sides of the aisle to be the same bay, with even shelves on one side (egg. South or West) and odd shelves on the other.
4. Number bays (and potentially positions) from lowest to highest along the picking path. (for example, if you pick towards a main aisle, locations would increase towards this aisle.)
5. Make your locations include a reasonable number of items. For example, for standard archive boxes on standard racking, a location might contain 9 or 6 boxes.

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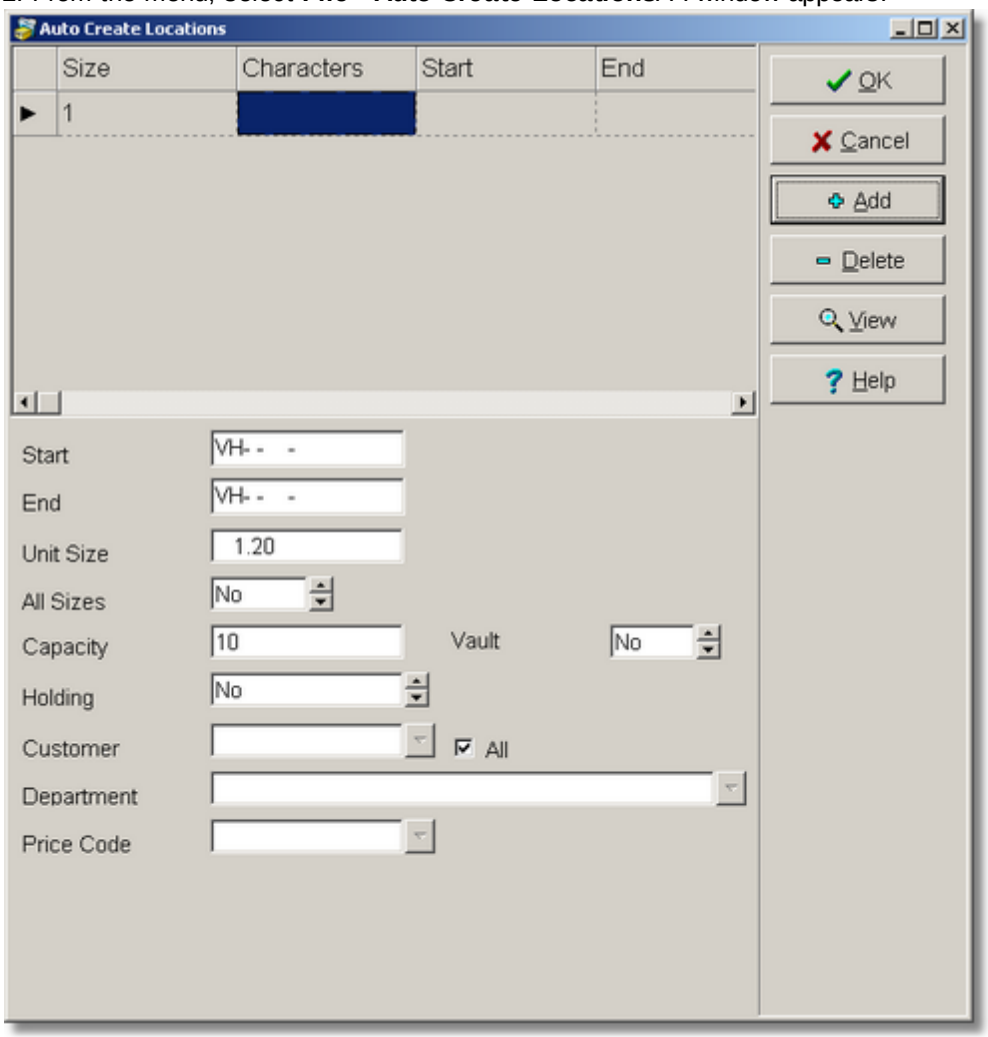
Auto-create locations

Within your record center you will have many locations that are allocated for the same sized box, have the same capacity, and are identical in all parameters except for the location address. The address of these locations will follow a grid pattern that establishes an efficient picking path. The most efficient way to create many identical locations at once is to use the auto-create location function.

First, take a look at your racking lay out and determine which locations are identical. For example, if your top shelves contain 6 boxes per position and the lower shelves accept 9 boxes per position, you would create these separately. If all of your aisles are double-sided except for the first one, you might create the aisles, and then use the related "auto-destroy" function to remove the locations from the first aisle which do not exist.

Once you have analyzed the patterns,

1. Open the **Inventory->Location** module
2. From the menu, select **File->Auto Create Locations**. A window appears.



3. In the **Start** field, enter the first address that you wish to create with this operation.
4. In the **End** field, enter the last address to create.
5. In the **Unit Size** field, specify the box type.
6. In the **All Sizes** field, set the value to **No** unless you wish the location to accept any size of box.
7. **Holding** will be No.
8. Specify the **Capacity** (number of boxes to accept) and whether or not these location are in the **Vault**.

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9. The **Customer : All** field will typically be selected, and the remaining fields will be blank, unless this location is being rented to a specific customer (see Fields (Location)[514]) for more details.

Having specified the parameters for the locations that we wish to create, we will now establish the patterns defining the location addresses to create with these parameters.

10. Beside the upper pane, click the **Add** button to add a segment. A segment is added to the top panel.

A segment is a part of the location address that is either constant, or is established by a simple counting pattern. For example, if all of the locations that you are creating are on the same picking level, (Say "01"), then the size of the first segment would be 2, the characters required would be (0,1), the segment would start at 01, and would end at 01. Any letters specified using capital letters (i.e. 'A', not 'a').

Note that the "building" segment does not need to be specified, since you can only create locations for the building that you are in, therefore it will always be the same.

11. Click the value in the **Size** column twice to edit it. Enter the number of characters in the segment (egg. 2 for picking level.)
12. Click the value of the **Characters** column twice to edit it. This will tell the function how to count. For example, if you want to create aisle A, B, C, you would enter these characters. If you are creating even number shelves, a segment might use the characters 0,2,4,6,8, in which case shelves 01, 03, etc would not be created with this operation.
13. Click the value in the **Start** column twice to edit it. (and you will do the same for **End**). Enter the start and end values for the segment to be used. (egg. if you are creating shelf 01 to 06, enter 01 for start, and 06 for end.)
14. Repeat for all remaining segments.

Once all segments have been entered in this way, the total of the Size column should add up to the length of the location mask, minus the length of the building segment and the number of separator characters (egg, dashes.)

15. Click the **OK** button. The list of locations to be created, including the total count will be displayed.
16. Review this to ensure that it makes sense, then close the report.
17. A dialogue window will prompt "Confirm?". If you click **Yes**, the locations will be created.

If you run the Auto Create Locations function again from the same module window without closing it, the settings will be conserved. Repeat for the next batch of locations to create.

The **auto-destroy locations** function behaves in much the same manner, except that it is not necessary to specify location parameters such as unit size and capacity.

Print location labels

Give some thought to how you would like to print your location labels. You may have thousands to hundreds of thousands of these. They must remain readable despite being rubbed as boxes come and go. Your options are: 1) Print on Thermal Labels, 2) Print on Laser Labels, or 3) Export to file.

Depending on the number of labels to print and your needs, record centers will typically either print thermal labels, or may have a professional printer print location labels on good-quality labels (either by printing laser labels to a pdf printer, or by exporting the list of location bar codes and having the printer work with that.) - (please discuss this with support@docudatasoft.com if you require assistance.)

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To print thermal labels

1. Open the **Inventory->Location** module (if it is not already opened).
2. Press the **F7** key. A dialogue window will prompt for a range of locations to print.
3. Enter the first and last locations in the range, then click the **Okay** button. The labels will be printed.

5.4 Configuring EDC for invoicing

EDC RC uses price codes to configure charges and descriptions for many operations and products. Your software will come with some predefined price codes, such as the Required price codes[741]. Other price codes will need to be created before they can be used.

If you are converting from an existing billing system, DocuData will work with you to bring in your price codes. If you are starting fresh, we recommend the following:

Create a spreadsheet of existing price codes:

1. Open the **Accounting->General Pricing**[734] module
2. From the menu, select **File->View report**.
3. Click the **save** button (diskette icon)

The saved file can be opened in a text editor or imported into your favorite spreadsheet application.

This list will include the Required price codes[741], which are the basic codes used by the system before the settings configured in the delivery type module and the box type module are applied and correspond to the billable operations[74].

Next, take a look at your proposed pricing structure. What prices or descriptions will vary based on the box type? What delivery charges will vary based on the delivery type? For each you will require a price code.

Price codes may be up to 4 characters long. We recommend using a system. For example, we commonly use a combination of two letter and two numbers, whether the letters correspond to the type of charge (e.g.. BR for box retrieval, FR for file retrieval), and the numbers correspond to the box size or delivery type (e.g.. 10 for size 1.0, 20 for size 2.0 box, and 00 for values that apply to multiple box sizes.).

If the prices are to be taken from general pricing, then you will set them up with the actual values. If a price code should be overridden for each customer, or on a case-by-case basis when reviewing invoices, we recommend setting the value to something that will stand out, such as $999,999.0

Each price code can be assigned to a GL code for accounting purposes. These can be assigned later, but you can save yourself some time by asking your accountant about these in advance.

Price code usage	Suggestion	Notes
Required price codes[741]		
Box type module	AA##	AA: (e.g.. BR for box retrieval, FR for file retrieval) ##: relates to the box size of box type. Use 00 for a code that is used by all sizes.

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Price code usage	Suggestion	Notes
Delivery type module	AA##	AA: (e.g.. TR for trip charge) ##: relates to delivery type, e.g.. 01 for regular.
Web license	WEB#	#: relates to options
Shredding container		
Line items	L!!!	!!!: any 3 characters. Using L will make it easy to identify line items.

Adding or editing a price code

1. Open the **Accounting->General Pricing** module.

If you are editing an existing price code

- Navigate to the desired price code and press **Ctrl-E** to edit.

If the price code does not yet exist

- From the menu select **Edit->Add**.
- You will be prompted for a price code. Enter the code and click **OK**.
- A dialog box confirms the addition. Click **Yes**.

2. Enter the desired information in the appropriate fields, then click on the **Accept** button.

Field	Suggestion	Notes
GL Code for boxes | tapes		Used to map charges to GL accounts. Speak with your accountant to learn if you need this.
English | French description		As it would appear on English | French invoices (may appear in drop-down lists and on the PDT for picking)
Price	$999,999.0 If to be modified or subject to customer override.	Applies when price breaks = None and units is not minutes. (in which case the charge is calculated at the customer's hourly rate[248].)
Units		Choice field that can contain values "Units", "Minutes", "Cubic Feet", "Megabytes", "Linear Feet" or "Delivery". This appears on the invoice with the quantity.
Time	1:00 or 0:01	When the Units field is set to Minutes, this specifies how much time (HH:MM) to charge at the customer's hourly rate for each unit of price code.
Price breaks	None	
Combo minimum	No	
Fractional quantity		Billing for half and hour makes sense. Half a box does not.

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Field	Suggestion	Notes
Line item		Can this be added directly to a delivery?
Customer specific		If line item is available to some but not all customers
Order entry, RC only		Order Entry: the item can be ordered at the RC through the orders module. RC Only: If not selected, the line item can also be ordered online.
Pickable		Applies to line items such as boxes, that must be marked as "picked" with the PDT to ensure that they are not forgotten.
Courier		Indicates to the system that it is a courier price, making it available to add to delivery types.
Tax calculation		How taxes are to be applied
Group		What heading the charge will appear under on the invoice
Maintain inventory, Minimum quantity, In stock		If the option to Maintain Inventory is on, Items ordered will be subtracted from the quantity in stock. When the minimum quantity is reached, a warning will advise to re-order.
Order minimum		Minimum number of line-item that can be ordered.
Apply commission		
# of items to include in trip (most | least expensive)		This is the number of items included in the trip charge (at no additional cost) when the courier billing option in the Customer Information module is not set to "Delivery". These items may be of different types.

Next, let's configure the box types[100].

Related topics

Overview (Box Type)[727]
Overview (General Pricing)[734]
Overview (Delivery Type)[722]
Required price codes[741]
billable operations[74]

5.4.1 Setting up box types

Box types are central to billing in EDC. Most customer accounts will be set to "use box types[253]", which gives you the flexibility to assign price codes to each operation for each box type.

Prior to setting up box types, consider what your strategy will be. Many record centers encourage their customers to use standard sized boxes. These stack efficiently on standard racking. They are also easier to handle and deliver than oversized boxes. Odd sized boxes will stored in separate locations and will be placed on different pallets for destruction. Try to limit your initial number of box types. It is easy to

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add more box types later if you wish to accept a significant number of boxes of a new type.

To get started configuring your box types:

Check if there is an existing box type that you could use

1. Open the **Accounting->Box Type** module.
2. From the menu, select **File->View Report**.

Depending on your installation, your software may come with partially pre-configured box types that have associated price codes. These have names like "BOX SIZE 2", "BOX SIZE 3", etc, and have volumes 1.0, 2.0, etc.. To finish configuring one of these box types, simply change the description and adjust any of the corresponding price codes that you will use.

3. Either navigate to the desired box type and press **CTRL-E** to edit, or click the green '**+**' button to add a new box type.
4. File out the fields as follows, adding new price codes 98 if necessary (see previous topic).
5. Once done, press **Ctrl-Enter** or click the green check-mark to accept changes.

Field	Suggestion	Notes
Description		
Volume	egg. 1.00	Essentially a key that links a box to the box type. Unless you are billing by volume, this does not need to match the actual billable volume of the box. Some record centers normalize to 1.00 = 1 standard archive box, so that the total of the box volumes gives the equivalent of the # of standard boxes in the record center. When billing by volume, the last decimal is not used in the calculation. (E.g. 0.80, and 0.81 will bill at the same rate.)
Tape	Yes for tape, otherwise No.	This affects the type of labels that are printed, various descriptions, and other tape-specific parameters
Accession	egg. AC10	Delivery charge for bringing a new box IN and to the shelf for the first time. May be cheaper than a refile (for promotional purpose), or may be higher to capture data entry service.

Storage

Field	Suggestion	Notes
Storage Price Code	egg. SR10	
Added	egg. AD10	"Storage for added boxes" description, billed at storage rate
Removed	egg. RE10	"Storages for removed boxes" description, billed at storage rate
Vault Storage Price	egg. SV10,	Similar to regular storage, but more

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Field	Suggestion	Notes
Code	AD10, RV10	expensive. (added and removed function as above.)

Picking and refiling

Field	Suggestion	Notes
Accession	egg. AC10	Charge for bringing a new box IN and to the shelf for the first time. May be cheaper than a refile (for promotional purpose), or may be higher to capture data entry service.
File in box accession	egg. FB10	Charge for "Re-filing" a new file to a box for the first time. Some record centers use this to bill for their inter-filing as well.
Box retrieval	egg. BR10	Picking charge This field can be overridden for specified delivery types[731].
Box refile	egg. BF10	Re-shelving charge. This field can be overridden for specified delivery types[731]
File retrieval	egg. FR00	
File refile	egg. FF00	

Delivery handling (applies with Item type courier billing[253] options)

Field	Suggestion	Notes
Box delivery handling	egg. BD10	
File delivery handling	egg. FD10	
Box return (pick-up) handling	egg. BP10	
File return (pick-up) handling	egg. FP10	

Destruction and withdrawal

(These should including any picking charges, if applicable)

Field	Suggestion	Notes
Non conf. dest. price code		Applied for destruction of this type of box, with the disposal type **Non confidential**. (typically used for destruction that is not done under record center supervision.)
Confidential dest. price code		Price code applied for destruction of this type of box, with the disposal type **Confidential**. Used for destruction done under supervision by the record center
Send to depot price code		Price code applied for the disposal of this type of box, with the disposal type Send to depot[868]. This is typically used when formerly active files are sent to the record

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Field	Suggestion	Notes
		center for semi-active storage.
Transfer price code		Price code applied for the transfer of this type of box, through the processing of a transfer list[552]. This is for moving pallets of boxes to an external storage facility.
Revision price code		Price code applied for destruction of this type of box, with the disposal type Revision[868]. Revisions involves sending pallets of boxes to the customer, who will decide what to do with them.
Sampling price code		Price code applied for destruction of this type of box, with the disposal type **Sampling**. Sampling involves keeping samples of the material and destroying the remainder.
Box deletion price code		Price code applied for permanent removal of boxes of this type, either through specifying a box as **permanently out** during order entry, or by processing a **deletion list**.
File deletion price code		Price code applied for the deletion of files from this type of box. **This is not widely used**.

Other settings

Field	Suggestion	Notes
Delivery type exceptions	See Defining delivery type exceptions[731] for additional details.	The default File retrieval price code and Box delivery price codes can be overridden for any number of specified delivery types. (For example, you may wish to charge more for urgent client pick-ups.
Quantity on Pallet		Used for creating pallets for transfers and disposal.

5.4.2 Setting up delivery types

In the section on global record center configuration, we saw how to set up delivery types[78]. (If you do not already know the parameters of the delivery types that you wish to offer, please review the topic.) For accounting purposes, we will confirm that the necessary price codes have been created and appropriately applied.

1. Open the **Accounting->Delivery Type** module.
2. Either navigate to the desired delivery type and press **CTRL-E** to edit, or click the green '**+**' button to add a new delivery type.
3. Configure the fields as follows:

Field	Suggestion	Notes
English Description		Will appear in drop-down lists and on

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Field	Suggestion	Notes
French Description		delivery slips, depending on depending on employee and customer language preferences.
Price code		(see below)
Return price code		(see below)

- **Price Code:** For imaging and fax delivery types, this is the per-page charge. For other delivery types, whether and how this setting is used depends on the customer's courier billing setting[253]. (By Item Type is very flexible)

Courier billing option	Price code applied
Delivery	Once per delivery
Container	Once per outgoing container*
Item	Once per outgoing container*
Round trip item	Once per container per direction
By Item type	- Not used - (pulled from box type)
Item type round trip	- Not used - (pulled from box type)

- **Return Price Code:** For delivery types that are not imaging or fax, whether and how this setting is used depends on the customer's courier billing setting[253] as follows:

Courier billing option	Return price code applied
Container	Once per returning container*
Item	Once per returning item

Field	Suggestion	Notes
Trip Charge	egg. TR01	This is applied once per delivery. For customers that use By item type or Item type round trip courier billing, it is possible to have this trip charge include a specified number of items (either the most or least expensive) free of charge (this can be seen in the general pricing module).The trip charge price code will typically differ from one delivery type to the next, though regular and by-date delivery types will frequently use the same price codes, so that orders of these delivery types can be grouped onto the same deliveries.
FUEL surcharge	FUEL	This can apply to physical deliveries. The same price code is typically used for all delivery types, allowing the record center to adjust a single price code in order to compensate for fluctuating fuel prices.
Ship mode		This affects the scheduling.
Deliver Within		For "By Time" orders.
Courier		This will affect how the goods or

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Field	Suggestion	Notes
		information are delivered to the customer.
Ordering	Regular=1 Most urgent= 99	Affects order in which delivery types appear for selection in drop-down lists.
Record center only		Makes unavailable on ActiveWeb
Box retrieval price code	BRET	Used if box is of a size not defined in the box type module.
File retrieval price code	FRET	Used if box associated with file is of a size not defined in the box type module.
Specific days only		This affects the scheduling.

4. Once done, press **Ctrl-Enter** or click the green check-mark to accept changes.

5.4.3 Setting up shredding container types

In order to offer shredding services using DocuData's mechanism for picking shredding containers or bags and tracking charges, it is necessary to define the shredding container types that you service and assign the corresponding price codes.

1. Open the **Inventory->Shredding Container** module.
2. From the menu, select **Edit->Container Types**.
3. From the list that appears, select the desired container type and click the **Edit** to edit, or click the **Add** button to add a new container type.
4. Configure the fields as follows, adding price codes 99 if necessary:

Field	Suggestion	Notes
Description	e.g.-96 gallon bin	
In stock		(see below)
Rotation charge (empty, 1/4 full, etc.)	e.g. S96R	If you do not differentiate based on how full the container is, use same code for all.
Container emptying charge	e.g. S96E	
Shredding container/ bag delivery	e.g. S96D	Only description portion of price code is used. It appears on delivery slip or picking lists
Shredding container/ bag return/pickup	e.g. S96P	Only description portion of price code is used. It appears on delivery slip or picking lists
Estimated weight	e.g. 25 lbs	Used to help ensure that you do not exceed the capacity of on site shredding or shred collection vehicles. (The average weight of a standard archive box of files is approximately 25 lbs.)
Adjust customer quantity		If you have known quantities of containers currently on site for an account, click this button to enter the quantity.

4. Once done, press **Ctrl-Enter** or click the green check-mark to accept changes.

The containers will need to be labeled. For bins, these labels may be attached directly. For console

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liners, record centers commonly attach the labels to a backing and laminate them before fastening the labels to the liner.

To print labels

1. Navigate to the correct shredding container type.
2. Press **F7**.
3. Enter the quantity of labels to print and press **Enter**.
4. The label will be printed.

To adjust the quantity of containers at a customer site

1. Navigate to the correct shredding container type.
2. From the menu, select **Edit->Customer Quantity**.
3. Enter the **customer key** and press **enter**.
4. Enter the actual number of containers presently at the customer site and press **Enter**.

This number will automatically be increased when a container is delivered to the customer and decreased when one is brought back. A report of the number of containers by customer site may be viewed in the **Inventory->Report** module.

5.4.4 Setting up transport containers

Transport containers enable you to securely and efficiently deliver files and optionally tapes and smaller boxes to your clients.

1. Define your required transport container types[585]. This will typically include file delivery pouches, file delivery boxes, tape transport cases, etc.
2. Create unique a unique bar code for each container[586], and attach it to the container.

Note: you can reprint a bar code if it is damaged, but do not use this function for labeling new containers.

5.4.5 Quickbooks export setup

Invoice information can be exported from EDC and imported into accounting packages in order to track your accounts receivable.

The following steps apply to setting up to work with QuickBooks. Some settings will vary depending on your region and on the version of the accounting package that you are using.

The general steps are:

In your accounting software:

1. Set up your chart of accounts. This includes the income accounts, and the names of these income accounts will match the GL Codes that you will assign to price codes in EDC.
2. In the chart of accounts, also note the name of the accounts receivable account ("Accounts Receivable" by default).
3. Set up your tax items. Search for help on how to do this if necessary. The sales tax name will serve as the GL Code for Tax A / Tax B, and the rates will be entered both in EDC and here. The Tax agencies will be set up as vendors that you collect money for. These should match the values that will be entered in EDC.

Note that it is not necessary to create customers in advance, as these will be created automatically with

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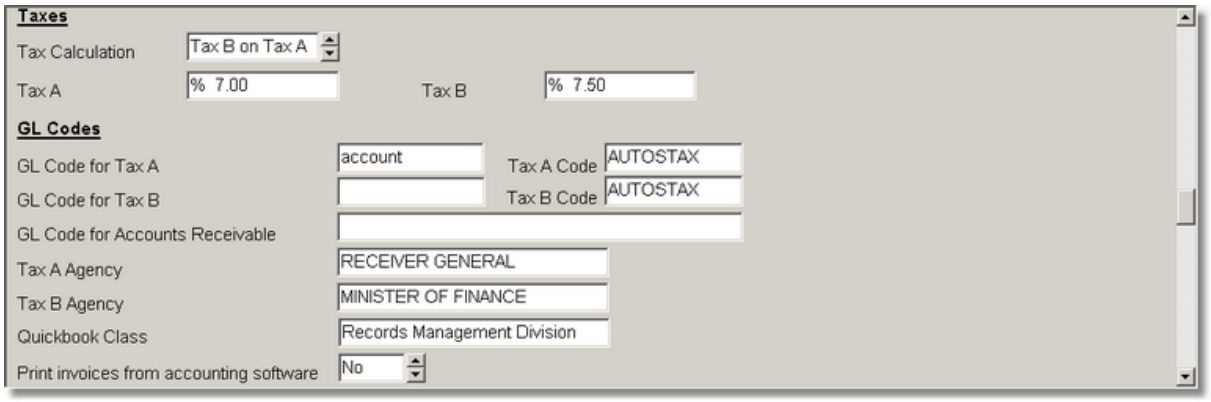
the import. If customers do exist, in the accounting software, then the name of the customer should match the customer key, or if this is not possible, the accounting key that you can assign to a customer in the customer information module.

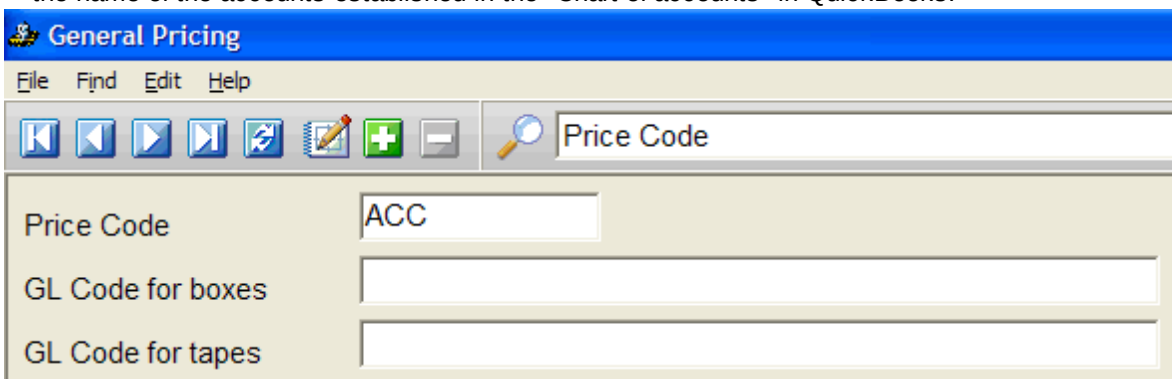
In EDC prior to exporting invoice information:

1. In the Taxes / GL Codes section of the **Management->System Information** module, configure settings to match those in QuickBooks (See above). The Tax A code and Tax B code will typically be AUTOSTAX, to identify these as tax accounts.

The QuickBooks Class is a user defined field which is useful if you are using the same accounting software to manage multiple divisions. In this example, data exported from EDC to QuickBooks will be identified with the class "Records Management Division". Other divisions can be given different class names. QuickBooks Class in the System information module can be overridden in the Customer Information module. It can also be left blank.



2. In the **Management->Buildings** module, set the tax rates and calculations for the area serviced by the buildings
3. In the Accounting->General Pricing module, set the GL codes for each price code in EDC, to match the name of the accounts established in the "Chart of accounts" in QuickBooks.



Once this has been done, you should be able to export your invoice information from EDC and import it into QuickBooks.

1. Export your invoice information[700] from the **Accounting->Invoicing** module using the **File->Export->To QuickBooks** option
2. Import inside of QuickBooks like so:

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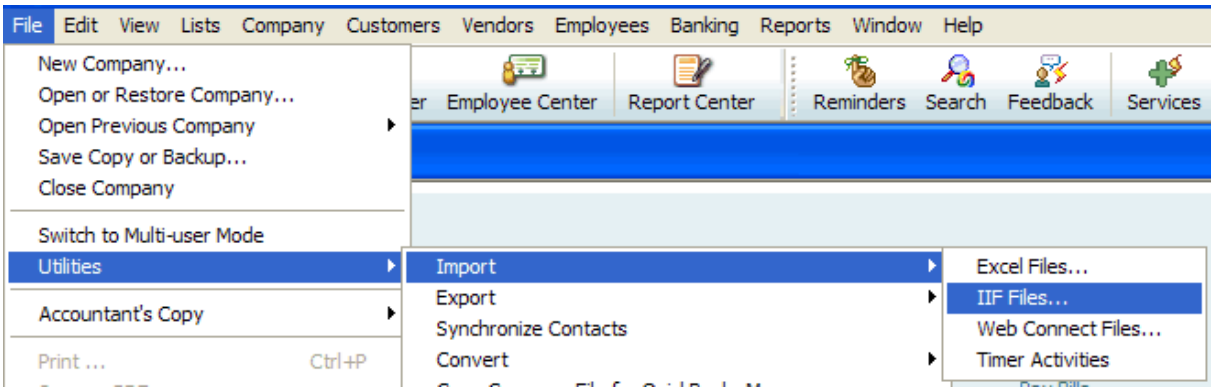

Note: The menu to import IIF files in your version of QuickBooks might differ from the one shown here.

5.5 Running tests on a demo system

Most large record centers have a test environment in which they can try out new features of EDCRC before updating their live database, try out new procedures, train employees, and test to make sure that their back-up solutions are working properly.

As a supplemental solution for record centres who do not yet have their own test environment set up, or who wish to do preliminary tests without maintaining their test systems, you may use the following test environment provided by DocuData:

- From your Windows menu, run mstsc.exe
- Use demo.docudatasoft.com:3391 as the address
- demo.docudatasoft.com:3391
- user name: support\demo01
- password: Docudata123

Note that this system is limited to one or two concurrent users, therefore a connection might not always be available.

Please also note that the data is reset every night. Therefore, changes that you make one day will not be present the following day.

If you have special requirements, please contact support@docudatasoft.com for further options and suggestions.

5.6 Setting up RimsLink

RimsLink facilitates partnership between record centers to offer customers multiple points of service through a single point of contact. For a given client, a Billing record center manages all financial interactions, while Service record centers provide additional storage and services. These are billed through the Billing record center.

Customers may access ActiveWeb for the appropriate point of service (ie. the record center where the items they seek are) through a unified web portal.

Setting up and operating as the Billing record center for a customer

1. Deploy the ActiveWeb Portal 111 (This only needs to be done once at your record center).

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2. Set up the customer account[125], using their regular billing contact information.
3. Set up the link to each Service record center[110], adding the customer to the list of shared customers.
4. Provide authorized users access to Service record centers[111]
5. Map RimsLink Pricing[112] (can also be done immediately prior to invoicing)
6. Service the customer
7. Prior to creating the invoice, verify that all deliveries have been returned for the customer and period. If there are delays, it may be necessary to put this on hold on the auto selection until all Service record centers have completed their work.
8. Bill the customer
9. Pay Service record centers

Setting up to act as a Service record center for a customer

1. Set up the customer account[125], using the Billing record center billing information
2. Create a Billing record center password[113], and provide them with the necessary information
3. Submit invoice to the Billing record center. (The service record center may use the address of the billing record center as the billing address for the account).

Some tips on setting up and testing connections:

Testing if an RPC server is running at the provided address, port, and SSL - status:

- Try connecting to the RPC server with your favorite web browser (e.g. Chrome)
- If you are trying to connect to a server running without SSL at the address "localhost" on port 11003, enter the following address: http://localhost:11003. If you have an IP address or web URL, replace "localhost" with that.
- If you are trying to connect with SSL=yes, try HTTPS instead of HTTP
- If you see a page that has lots of <> in it or contains "*at line 1 and column 1, tag "": expected start tag.*", then you have been successful.

Testing connections and credentials inside EDCRC:

Viewing or configuring settings:

- Open the **Management->System Information module**.
- From the menu, select **Edit->Subcontractor record centers**.
- Add your new record center if it is not there, by pressing the **Add** button, or click **Edit** if you wish to view or make changes.
- Fill in the fields. The *Web Server URL*, *ReturnUrl*, and *Shared Customers* are not required for this operation, though enter them if you have them.
- Close out these windows when done.

Testing the settings

- To test the settings, open the **Accounting->RimsLink** module. A list of record centers appears.
- Select the record center to test.
- If you receive an error message that the connection has timed out, then contact the remote record center to ensure that they have provided the correct credentials and that the RPC server is presently listening at the port and URL that they provided.

(Note that some record centers open this port only while the invoices are being run.)

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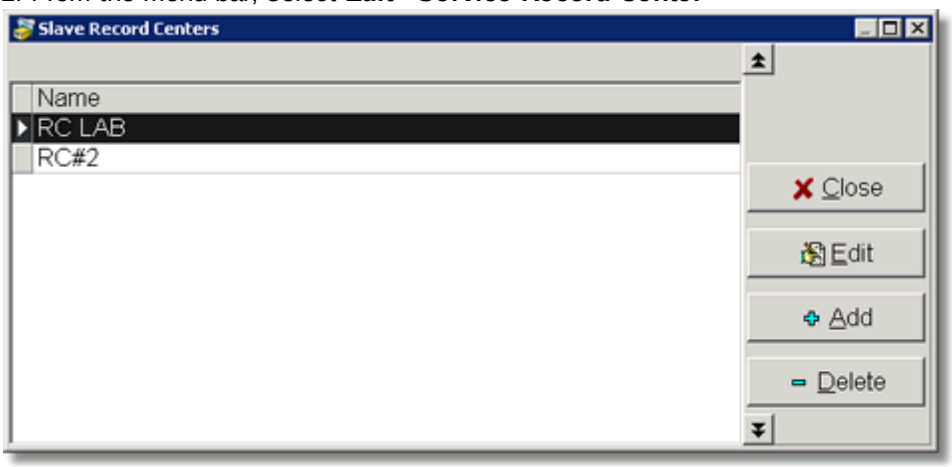
5.6.1 Adding, Editing, or Deleting Service Record Centers

At the Billing record center, the Service record centers and shared customers must be specified.

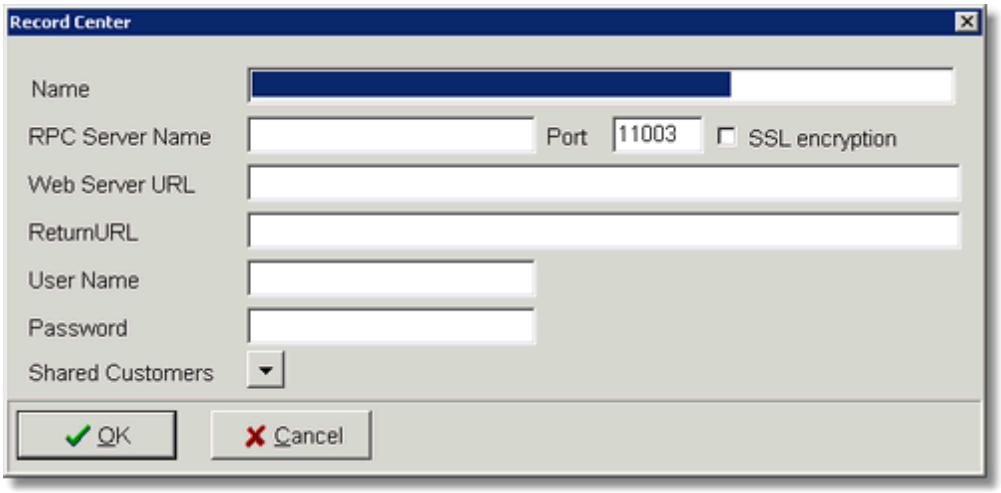
Open the list of Service Record Centers

1. Open the **Management->System Information** module.
2. From the menu bar, select **Edit->Service Record Center**



To add a Service Record Center to the list

1. Click the **Add** button. A window appears.



2. Fill out the fields:

Name: Used in the system and the ActiveWeb Portal to identify the Service record center

RPC Server Name: The URL of the Service record center RPC server (egg. myServiceRCDomainName.com, port, and whether or not SSL encryption is used. This is strictly for billing purposes. The service record center may close the RPC server port when the billing record center is not running invoicing.

Web Server URL: The URL of the Service ActiveWeb application. This is required for the ActiveWeb Portal.

ReturnURL: The URL that the customer will be returned to when they close the Service ActiveWeb application.

User Name and Password: User name and Billing record center password[113], provided by the Service record center.

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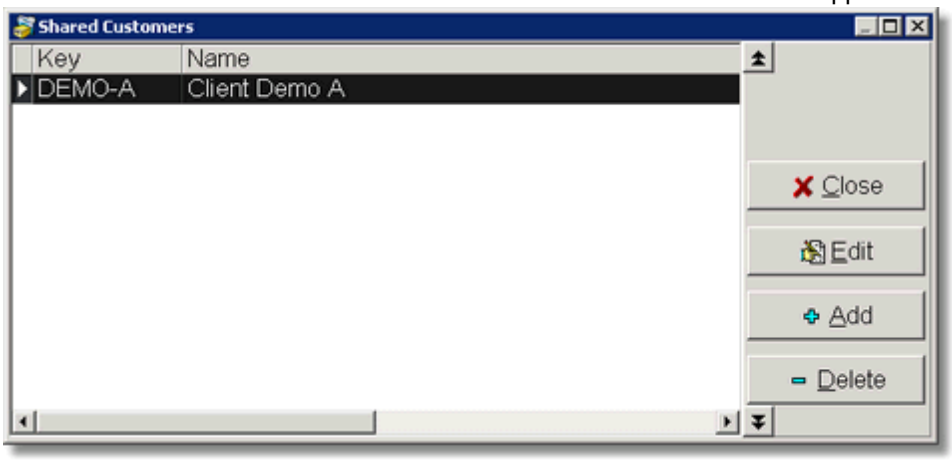
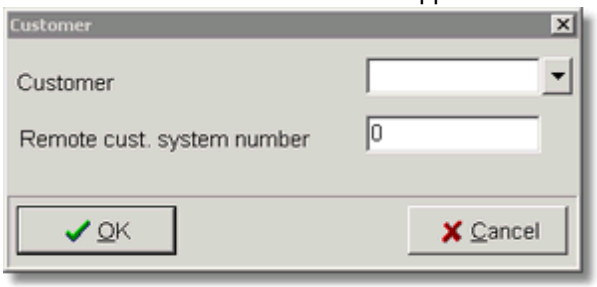
3. Click on the **Shared Customers** button. A list of shared customers appears



4. Click the **Add** button. A window appears.



5. In the customer field, enter or select the customer key of the customer used at the Billing record center
6. In the Remote cust. system number field, enter the system number[249] of the customer at the Service record center, which they can locate in their **Customer->Customer Information** module.
7. Click **Ok** when done.

You may now deploy the ActiveWeb portal[111], provide access to authorized users[111], and once invoices have been created to import from the Service record center, map RimsLink pricing[112].

5.6.2 Deploy RC Web Portal

The ActiveWeb Portal permits authorized users to access ActiveWeb for multiple record centers by logging on to a single page.

The ActiveWeb Portal can be deployed using a wizard. Detailed instructions are available in the technical manual. To access the wizard:

1. Open the **Management->System Information** module.
2. From the menu, select **File->Deploy ActiveWeb Portal**.

Note that the customer must have a valid web license available at each record center that they wish to access electronically.

5.6.3 Provide authorized users access to Service record centers

Authorized users must be set up to access ActiveWeb[127] with the same Login Name and Password at

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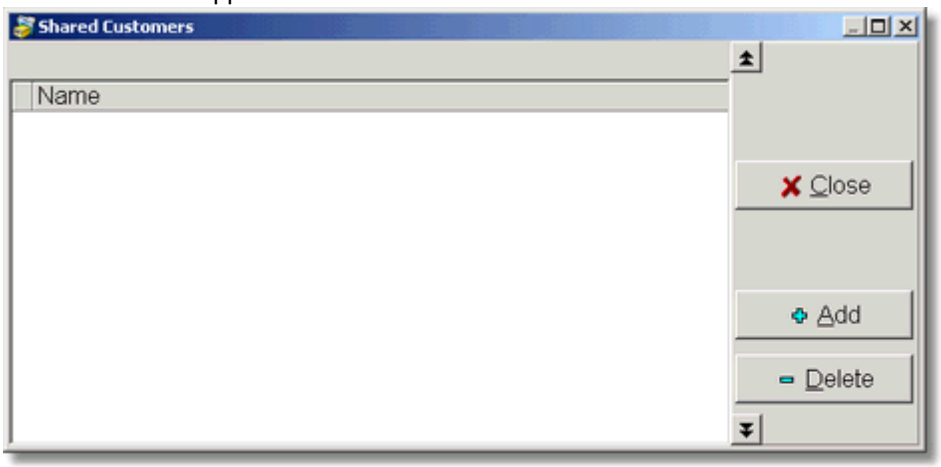
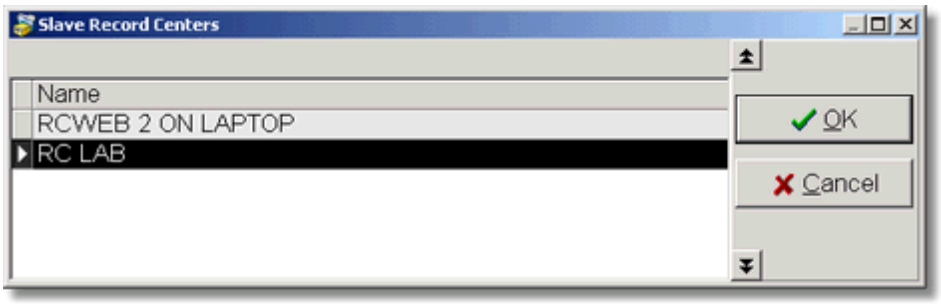
each point-of-service record center.

To specify which service record center locations authorized users can access,

1. Open the **Customer->Authorized User** module
2. Click the **Edit** button or press **Ctrl-Enter**.
3. Click the **Shared Customers** button to access the list of shared record centers that the user can access. A list appears



4. Click the **Add** button to access a list of service record centers



5. Select a service record center to add access to, then click the **OK** button.
6. Repeat steps 4 and 5 to add additional record centers.
7. Click the **Close** button when done adding record centers.
8. Press **Ctrl-Enter** or click the check mark to accept changes to the authorized user profile.

5.6.4 Map RimsLink Pricing

Billing and Service record centers may use different price codes for the same service. It is therefore necessary for the Billing record center to map the price codes used to their own.

To map price codes for a Service record center:

1. Ensure that at least one invoice exists at the Service record center for at least one shared customer.
2. Open the **Accounting->RimsLink Pricing** module. A list of Service record centers appears

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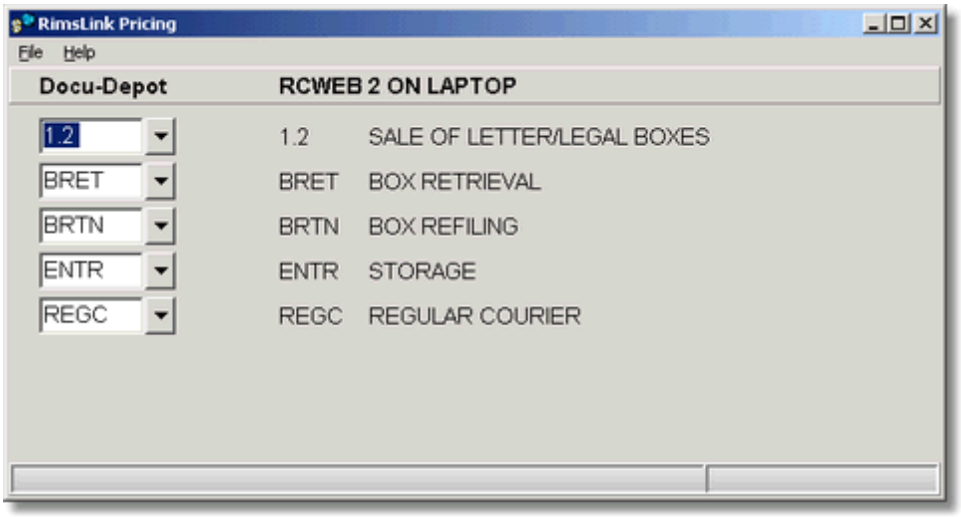
3. Select the desired Service record center and click the **OK** button. A window appears.



4. In the fields to the left, enter or select the Billing record center price codes to match the Service record center price codes to the right.
5. To map pricing for another record center, select **File->Open Service Record Center**.
6. Close the module when done.

5.6.5 Creating a password for the billing record center

A Billing record center password is a password issued by a Service record center to permit the Billing record center to access invoices for shared customers.

To create, modify, or delete a Billing record center password, the Service record center performs the following steps:

Open the Billing record center password list

1. Open the **Management->System Information Module**
2. From the menu bar, select **Edit->Billing Record Center Passwords**. A list of Billing record center passwords appears:

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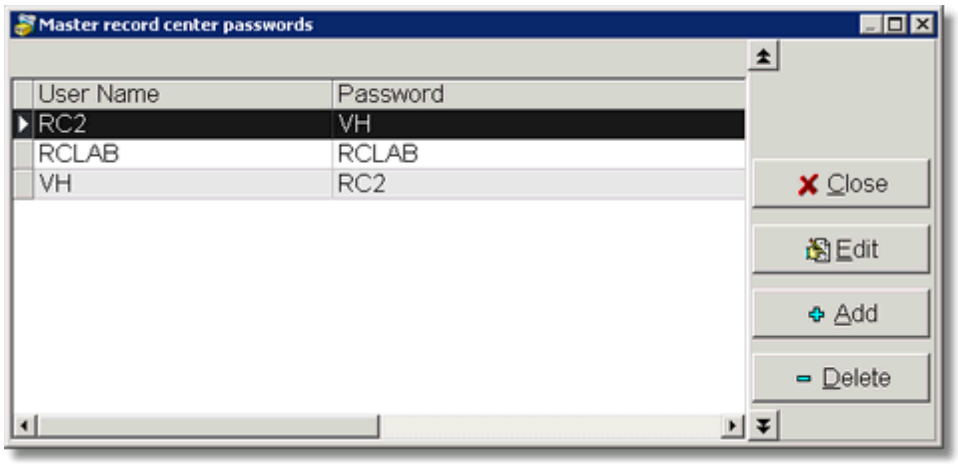

To add a password to the list

1. Click the **Add** button. A window appears:

2. Create a User Name and Password.
3. Click **Okay** or press the **Enter** key

To edit a user name or password on the list

1. Select the password to be modified
2. Click the **Edit** button
3. Overwrite the user name or password
4. Click **Okay** or press the **Enter** key

To delete a user name and password from the list

1. Select the password to be modified
2. Click the **Delete** button
3. Click **Yes** to confirm deletion of the password

6 Setting up accounts

6.1 Customers

Because there are so many different ways that different record centers can service their unique customers, EDC RC has an almost overwhelming number of customer settings.

Once you have set up an account, this account may serve as a template for creating subsequent accounts using the copy and add function[279].

The following guidelines walk through the decisions and process of creating an account for the first time.

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For adding new customer accounts to your list of existing accounts, please see your own operations manual[72] , which you may create based on the section on account management in the procedures and training section.

6.1.1 Choosing default settings for template customers

The following settings are typical settings that can serve as a guideline in setting up an initial or template customer account that can be used in creating similar accounts through the copy and add function. Some of your settings will likely be different, based on your marked needs. For a full reference on any of these fields, see the corresponding section in the reference manual, Fields (Customer Information)[248].

Note that your key settings should be specified in your operations manual (at least in the form of a reference to an account), and those settings take precedence over the suggestions here.

If you have existing customers set up with typical parameters and pricing, you may wish to create a template customer based on one of these, using the copy and add function. (Note: you will likely not do this if your record center size is measured by the number of accounts.)

If you wish to create your template customer from scratch, you would
1. Open the **Customer->Customer Information** module
2. From the menu, select **Edit->Add**.
3. When asked "Does this customer use the client version of the software", click **No**.
4. Set the field values, consulting the guidelines below.
5. When done, press **Ctrl-Enter** to accept.
6. Set up additional parameters for template customers[122]

General

Field	Suggestion	Notes
Name		Unique per customer
Customer key	Establish your own standard egg (AAA##)	Unique per customer. Will identify customer on box labels and delivery slips. Is used by your customers in accessing ActiveWeb.
Accounting key		Optional, if identifier for exporting to account package differs from customer key.
System		(System assigned, not modifiable)
Active	Yes	If "No", the account will not appear in drop-down lists. An account cannot be made inactive while active boxes or files remain.
Locked	No	Prevents web access and orders on past-due accounts
Delivery types	Standard delivery types	Click the drop-down to build a list. This will include delivery types in your standard contract, as well as delivery types used internally by the record center (such as a "No Charge" delivery type for

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Field	Suggestion	Notes
		canceling charges).
Ordering notes	None, unless needed	Pop up when placing an order for this customer in EDC RC.
Shredding containers	None	
Sales person		Each sales person may have their own template, in which case their name would appear here.
Apply commissions, and other commissions settings	Per your policy	
Address, and related settings		These will not be copied when copying a customer

*Billing

Field	Suggestion	Notes
Bill to		Unique per customer, will not be copied. If blank, customer address is used
Auto Invoice	Yes	Includes this customer in monthly billing if charges exist.
Net days	egg. 0 or 30	Per your policy. If invoice is due on receipt, put 0
Billing	Regular	Law firms often use "charge back". Large companies and hospitals may use "Departmental" billing. Other small companies typically use "regular".
Invoice Start Month		Applies to customers invoiced at a frequency other than monthly.
Invoices per year	12	Service invoices are only created if there are charges to be applied
Minimum invoice adjustment	According to standard contract Usually "Storage".	This field indicates the minimum amount to charge a customer every month. If incurred charges are less (storage fees, services, etc.), and adjustment will be applied for the difference. If the Storage box is checked, the adjustment calculation will consider only storage fees. In this case, it will not be applied until the customer has boxes in inventory. The description on the invoice is taken from the price code MINV, but the price is taken from this field in the customer information module.

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Field	Suggestion	Notes
		usually applied to storage, at a monthly rate.
Separate Rent Invoice (Rent Inv. Start Month, Storage Invoices/ year)	No, except if storage is not invoiced monthly	If "Yes", the rent invoice start month and Storage Invoices / Year settings will determine the frequency of storage invoices and in which months they are issued.
Page brk. detailed inv.	No	
Billing Building		Relates to invoice creation. Note that taxes are taken from the main customer building (not the billing building).
Taxable	Yes	
Hide zero lines on invoice	egg. No	(also applies to detailed invoice and delivery summary)
Business 350		If the template is for a specific business type, use that. Otherwise, indicate unassigned.
Highwater storage 252	No	Yes if you want to bill in arrears for the highest storage volume during that period. More popular with tape accounts.
Purchase order	Blank	(customer specific, not copied from template)
Renewal date		customer specific
Charge rent	Forward	Forward tends to be industry standard in most regions. Arrears is sometimes used with tape accounts.
Storage calculation	Monthly	
Storage Credit	Yes	Use this combination if you prorate storage fees for boxes added and removed
Bill full month add/del	No	
Days per year daily billing	365	Not applied with monthly billing. Sometimes 360 with banker's calendar.
Courier Billing	By Item Type	This is the most flexible option. See Setting up service parameters and pricing structures (delivery types) 78 for a discussion of other options
Service only	No	Indicates no storage
Uses box types	Yes	(The alternative, the older method of using hard-coded price codes

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Field	Suggestion	Notes
		741, is much less flexible.)
Hourly rate	(according to contract)	Used for price codes that have units of time.
Invoice format		Electronic requires a billing e-mail address.
File tracking charge	No	
Minimum Touches Box Change Charge	0	The re-boxing charge will not be applied if the box has not been touched at least this many times for box or file orders for that box.
Quick books class		Speak to accountant. May be required if you run multiple businesses from same accounting application.
No charge boxes out	No	More popular with tape accounts. Requires storage to be billed in arrears.

Field	Suggestion	Notes
Web access fee 255	By user count	Create and apply a price code related to the level of license purchased by the customer

Options

Field	Suggestion	Notes
Delivery time	Both	Applies with twice-daily delivery cycle. Setting may depend on customer receiving hours or delivery location if you have AM/ PM routes.
Pick up time		
Container type	Both	"Tape only" for accounts that will never have boxes. Affects web interface.
Hide quantity from delivery/ret slip	Yes	
Language	egg. English	Will affect invoices, delivery slips, customer reports.
Record series by department	egg. No	Allows different departments to have different record series lists and retention properties.
Non-track warning	Yes	Warns if customer attempt to order previously excluded, non-

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Field	Suggestion	Notes
		inventoried file.
Range mask	(Blank)	
Minimum Password Length		Depends on security policy
Delivery labels	No	(prints address labels for box deliveries)
Force passwords	Yes	
Alphanumeric passwords		According to security policy
Type integrity	No	"yes" prevents files of one type from being moved to a box of another type.
Restriction integrity	Yes	Prevents files with a restriction from being moved into a box that does not have the same restriction.
Department integrity	No	
Disposal date integrity		Depends on whether you want to help customers manage their disposal to the file level.
Return to	(Your RC).	Appears on box and file labels
Location mask	(Blank)	Applies to ActiveFile set-up.
Default Box Volume	egg. 1.0 or 1.2	Standard box or tape volume for this type of customer
Data capture before accession		This will send an e-mail if new boxes arrive without data entry
Volume Equivalence box = location	Blank	Allows boxes of one size to be put into locations of a different specified size
Order PRE ADD files	Yes	
Hide "Perm out" option	No	
Validate date range	Yes	Verifies for dates that the "from" value is earlier than the "to" value
Extra delivery slip per order	No	
File out cards	Yes	Required for standard operations
File to search conversion	Yes	Charges file search fee instead of pick when non-indexed file is excluded
Sealed box	No	Places box on order when a file it contains is ordered
Limit to one building (Building)	Yes	Applies if RC has multiple buildings. Makes delivery more efficient.
Has Split		"Yes" indicates some items have been moved to another account
Unique file number	No	Set to Yes if a customer may not

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Field	Suggestion	Notes
		have multiple files with the same file number (egg. blank)
Time with by date order	No	Allows customers to specify a time for scheduled deliveries. This information will appear as a note at the bottom of the delivery slip.
Order grouping	Yes	Otherwise each order will result in a separate delivery and trip charge.
Tape number change	No	
Immediate delivery	No	
Default box number length	egg. 5	
Default file number length	egg. 7	
Automatic box number		Useful for customer willing to use your numbering scheme
Automatic file number		
File in box tracking	No	
Use ID cards	No	
PDT Number Change	No	Turned on temporarily for special operations
Position of extra fields	egg. bottom	
Delivery with PDT		Depends on whether drivers carry PDT. Required for standard shredding procedures.
Bar code on file pick label	Yes	
Truck validation	Yes	
Double Pick	No	
Full text search at RC	Yes	
Show end of rotation on delivery slip	Yes	
Recycle after destruction	No	
Use expected return dates	No	Prompts customers to specify a return date for items on a order when they go out
Simple web interface	Yes	Removes banners from ActiveWeb, allowing more workspace
Web Time Out	Default	Typically 15 minutes. This can be altered for specific users
Notes on paper pick list	egg. Yes	(Picking is generally done with PDT, not paper pick lists.)
Default by date order time	egg. AM	
Hide labels module on web	No	Most RCs issue box labels in advance. However, customers

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Field	Suggestion	Notes
		may still wish to print file labels.
Hide box sale	Yes	Many record centers offer multiple box sizes for sale as line-items
Hide alternate labels on web	Yes	
User field 1 on delivery slips	No	Varies with customer data. Often No.
Lock list items	Yes	Prevents items on disposal lists from being ordered.
Fixed disposal by default	egg. No	No if customer manages disposal using EDC's record series. Yes if they typically specify a fixed disposal date in advance for each box.
Relax add to list check	Yes	
E-mail delivery / return slip	No	Set this up for each customer. Requires e-mail address, which is not copied from template.

***Accession**

Field	Suggestion	Notes
Department	(blank)	These fields are used during special operations, and should otherwise be left blank.
Document type		

Pick up

Field	Suggestion	Notes
Morning picking time / afternoon picking time	(Blank)	These override system information settings. Try to avoid unnecessary exceptions
Once a day option	"Use value in system information"	

Field	Suggestion	Notes
Contact/Name/Telephone/Fax	(Blank)	These values are not copied from template
Mailing labels		

Invoices

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Field	Suggestion	Notes
Print detailed invoice	No	These are attachments included with invoices. It is generally advisable to let customers know that these reports are available upon request.
Print delivery summary		
Print out boxes list		
Print activity report		
Print authorized users		

Fast Orders

Field	Suggestion	Notes
Default order user	(blank)	Rarely used. Fast orders skip steps in the order entry process.
Recipient		
Delivery type		
Delivery address		

Schedule

Field	Suggestion	Notes
Override default schedule	No	Causes record center business hours to be different for this customer. For example, one customer might negotiate regular deliveries on the weekend. Avoid exceptions if possible.
Deliver during record center holidays	No	
Delivery/Opened/Start/End		Not applied unless "Override default schedule" = Yes.

Related topics:

Set up additional parameters for template customers 122
copy and add 279

6.1.2 Set up additional parameters for template customers

Multiple options may be carried over when creating a new account based on existing account or template when using the copy and add function. Therefore, you will want to ensure that accounts which are to be used as templates are well set up with the appropriate generic settings.

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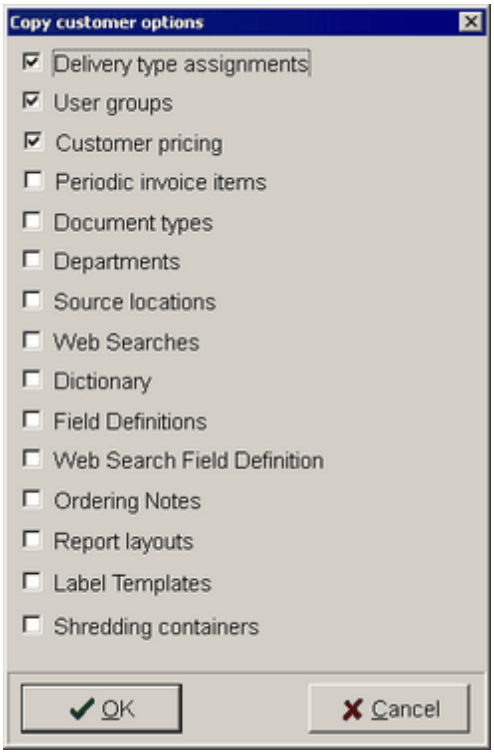

The following additional settings remain to be configured:

Copy customer option	Suggestion	Notes
Delivery type assignment		These are associated using a drop-down list in customer information 115
User groups		Typically create a "Web supervisor" and "Web user" group for the template, and add additional profiles as required
Customer pricing 743		
Periodic invoice items 749		
Record series		If you issue labels to customers in advance,
Departments		
Source locations		
Web Searches		
Dictionary		
Field definitions		
Web search field definitions		
Ordering notes		(in customer information) 115
Report Layouts		
Label Templates		

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Create customer-specific lists

1. In the **Customer->Delivery Address** module, create any additional delivery addresses[329].
2. In the **Customer->Source Locations** module, define the source locations[328] if the customer intends to specify the origin of documents. (This is not widely used).
3. In the **Customer->Retention Schedule** module, define any required record series[315] not copied from the template customer. If temporary restrictions[333] exist on the destruction of certain box types, create and apply these as well.
4. In the **Customer->Customer Holidays** module, add any customer-specific holidays[335] to prevent deliveries on these days. (Note that customers may do this themselves using ActiveWeb)
5. In the **Customer->User Groups** module, create any additional user groups[312] not copied from the template.
6. In the **Customer->Authorized Users** module, create authorized user[303] profiles and assign passwords for customer employees authorized to access ActiveWeb or place orders by phone.

Miscellaneous options

7. Import[779] box and file information, if this information is available.
8. Set up the Full Text Search[126] if the customer is using ActiveWeb or requires text searches while placing orders.
9. Set up a tape rotation[126] if the customer stores their back-up tapes at your record center.
10. Set up EDC ActiveFile[126] if the customer is using this application to manage their on-site records management.
11. Set up the customer for ActiveWeb[127]
12. Set up the customer for imaging delivery[130]

6.1.3 Setting up a service-only template customer

Configuring a service-only template account enables you to rapidly create orders for service and supplies for accounts that do not yet exist. It also helps to you set up C.O.D. (cash on delivery) accounts where you can take payments and issue receipts through rcMobile. (If the same customer has both monthly billing for records management services and immediate payment for other types of services, then you will likely want to set up both a records management and COD / service-only account for the same customer.

To set up your service-only template account:

1. In the **Customer->Customer Information** module, navigate to your standard customer template account[115].
2. Press the green '+' button or select **Edit->Copy and Add** to create a new account based on the template.
3. Select the copy options. You may wish to keep all of the default options, as you may convert service-only accounts to recurring accounts in the future.
4. Fill in any required fields such as renewal date.
5. Press **Ctrl-Enter** or the green check mark to save. If you have missed any required fields then EDC will beep and guide you to them.
6. Press **Ctrl-E** or the edit button to go back into Edit mode.
7. Press the *Delivery types* drop-down triangle to adjust the available delivery types. To accommodate various types of service-only requests, you will likely add a regular delivery, on site and off site by-date delivery types, and a client-pick-up/drop-off type.

Other settings:

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Field	Suggestion	Notes
Service only	Yes	

6.1.4 Setting up a new customer

6.1.4.1 Setting up a service or supply account while taking an order

While setting up a records management account involves contracts and a long-term relationship, customers may also contact you to sell them supplies or one-time services where you will want to set up a basic account very quickly and collect payment on delivery rather than at month end.

Setting up

1. In the **Customer->Customer Information** module,set up a service-only template account[124], including which delivery types, price codes, shred bin types, etc. the accounts should have access to.
2. In the **Management->System Information** module, specify the template account from the previous step, and accept or change the number of characters to use when creating these accounts.
3. In the **Order->Orders** module, place the order. After searching to determine that the account does not yet exist, add the account using the rapid account set-up[597] interface.

6.1.4.2 Set up the customer to be billed

It is good practice to keep service and billing as standard as possible for typical customers. Many billing options are configured at the customer level. Therefore, it is advisable to create new customer profiles using the Copy and Add function[279] based on a standard or template customer, and then review and modify this profile to meet any special conditions.

Set customer-specific billing parameters in the Customer Information[248] module

1. Assign Delivery Types[249]. Include types that they will be able to order (e.g. regular, 2 hour rush...), and types that you will use for billing the customer (e.g. record center work.)
2. Specify the Customer billing address, and billing email address (if invoicing electronically), and complete the remainder of the billing section[250].
3. In the options section, ensure that Order grouping = Yes if multiple orders for compatible delivery types to the same address on the same date are to be grouped onto a single delivery.
4. In the Invoices section[265], select the additional reports to automatically include with the invoice. Typically, these are included only when it is clear that they will be useful to the given customer.

Configure addition customer billing parameters

5. If invoicing the customer by department, in the **Accounting->Departmental invoicing**[753] module, define departmental invoices
6. In the **Accounting->Customer Pricing** module, override specific price codes for the customer[743], if they have special pricing.
7. Set up billing for periodic charges[749].

6.1.4.3 Set up a user for an account

The authorized user module enables you to configure and review settings for people associated to an account.

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Users may have some or all of the following general types of authorizations:
- Request orders from the record center
- Log into ActiveWeb or ActiveFile
- Receive shipments by the record center
- Sign for disposal lists

Please consult your own record centers' operations manual for your own specific policies on user configuration. However, here are some general suggestions that you might consider:

- Each user should have their own profile.
- If the client has a staffing change, make the old user inactive and add new user with similar permissions.
- ****

6.1.4.4 Setting up a customer to use Full Text Search

Full text searches rely on an index which can become quite large. EDC RC performs indexing in the background when the system is not otherwise busy.

In the **Customer->Customer Information**[248] module, set the Full test search at RC field to Yes (found near the bottom of the options section in the left column). For multiple clients, see Activating multiple clients to use the Full Text Search[272].

To trigger the immediate indexing of a customer's text fields, perform batch indexing[468] in the box and file modules.

Note: When batch indexing one or many boxes, the software will not index the boxes' files. Batch indexing may take a while, and could possibly slow down EDC for all users (it is better to do a batch indexing during less active periods.

6.1.4.5 Setting up a customer to use a Rotation Schedule

1. In the **Accounting->Delivery Type** module and the **Customer->Customer Information** module, ensure that the customer has access to a delivery type[249] with ship mode = by date, and courier = record center. (The first such delivery type will be used for scheduled rotations.
2. Create a Rotation Schedule[494], or have the customer do this in ActiveWeb (see ActiveWeb manual for details).

Note: It is very important that record center holidays be entered in advance, to prevent scheduling of delivery on these days.

6.1.4.6 Setting up a customer to use EDC ActiveFile

EDC ActiveFile is used by customers to manage their active (in house) records and their semi-active (off-site) records together. (For details on installing the software at the client site, see the ActiveFile manual).

At the Record Center

1. In the **Management-> System Information** module, ensure that the replication[370] information section (the second section) is complete.
2. In the location that you specified for the Client installation folder, place the client installation package corresponding to your database level. (Find this at ftp://docudatasoft.com/record_center/ClientInstallationPackage/)
3. If the customer profile has not been not created, set up the customer[125]. When prompted, "Will the

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customer be replicated?", click **Yes**.

4. In the **Customer->Customer Information** module, in the Address section near the top, ensure that an e-mail address has been entered. This will be used for sending the customer set-up information. Ensure that delivery types have been assigned.
5. In the **Customer->User Group** module, a group with total access must exist
6. In the **Customer->Authorized User** module, a user with total access must exist. The customer will require the user name and password.
7. In the **Customer->Delivery Address** module, a delivery address must exist.
8. In the **Customer->Department** module, if no departments and sub departments have been created, consider entering adding a default one such Department = "Select department", sub department = "."
9. In the **Customer->Retention Schedule** module, if no record series exists, create a default record series = "Select", description = "Document Type".

6.1.4.7 Setting up a customer to use EDC ActiveWeb

In the Customer section:
1. *In the **Customer Information** module, generate a web license[281] or add a web license[284] (this is for record centers that do not have access to a server).
2. *In the **User Group** module, create a user group[313] with the appropriate module accesses (ex: Boxes, Orders, System Information, Authorized Users)
3. *In the **Authorized Users** module, create users[306] in the usual manner with the usual accesses (see also setting up a new customer[125]).
   a. Make sure you include them in a group with the appropriate module accesses.
   b. *Give them a login name and define a password[308] (6-16 characters, not case sensitive) for them to access ActiveWeb with. Note that the minimum password length can be defined in the customer information module. It is also possible for a user to login with their e-mail address as well as their login name.

Be certain to provide the user with the correct address for your ActiveWeb.

Note:

Exceeding 10 failed login attempts for a valid authorized user within 10 minutes will cause that user to be marked as inactive. To reactivate this user:

1. Go to **Customer->Authorized User**, and navigate to the correct user
2. Press **Ctrl-E** to enter edit mode
3. Change the value in the **Active** field back to 'YES'.
4. Click the green check mark or press **Ctrl-Enter** to accept changes.

6.1.4.8 Setting up a customer to import data using ActiveWeb

EDC's import data with wizard[430] and import data[430] features enable you to update a customer's box information and file information by importing data from a spreadsheet.

The steps to set up customers to import their own data over ActiveWeb are as follow:

1. Establish a spreadsheet template for your customers to import their data from.
2. Create a description file mapping this data into the software.
3. Associate this description file to the customer
4. Ensure that the user is set up with the required web access rights and license.
5. Train the customer on importing their data.

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Note: Video tutorials are available on these subjects on DocuData's web page.

Establish a spreadsheet template for your customer to import their data from

We recommend establishing a spreadsheet template that matches your customer's data fields as they appear on ActiveWeb. The followings fields are a basic example for a box import. Required fields are in bold and red. Be sure to specify an appropriate date format.

Box number (Barcode)
Main Department
Sub Department
Retention/Record Series
Start date (MM/DD/YYYY)
End date (MM/DD/YYYY)
Range from (E.g. Apple)
Range to (Eg Zebra)
Description
Notes

You may wish to include a line of sample data, prompting the customer to replace it with their own values.

Create a description file mapping the data into EDCRC

The easiest way to create a new import description file is by using the data import wizard[432]. See this section of the manual or the corresponding video tutorials for full details.

1. Open the **Maintenance->Box and File Maintenance** module.
2. From the menu, select **File->Import data with wizard**.
3. Fill in the Data file section and click next.
4. Fill in the Mapping section then click next, paying attention to the following:

- The customer key field will be used for imports from the record center. On ActiveWeb imports will always go to the account that is accessed.
- If the Number field requires padding, click the **Options** button beside it and on the top line, Pad left to the desired length with the character 0.
- The Status field is a required field. Some record centers have their customers import everything to PreAdd status, allowing their customers to order PreAdd files.
- For boxes, Volume is a required field. Values in the Default column will not overwrite exiting values. You may use the standard volume for the customer's boxes (typically 1.0 or 1.2) as the size of the boxes will be confirmed or corrected when they are first scanned to a sized location upon arriving at the record center.

5. Select options that you wish to apply then click **Next**. For example, if you require customers to use box labels that you issue in advance, you would specify the "Box modify only" option.
6. In the Validation section, click the **Test** button to ensure that the import description file is free of errors. If you need to make corrections, click the **Back** button and make the changes then run the test again.
7. Once the test is successful, click the **Save As** button to save the description file.
8. Unless you wish to actually perform an import, click the '**x**' in the top right of the window to close it.

Associate the description file to the customer

1. Open the **Customer->Customer Information** module.
2. Navigate to the desired customer.
3. Press **Ctrl-E** or click the edit button to enter edit mode.

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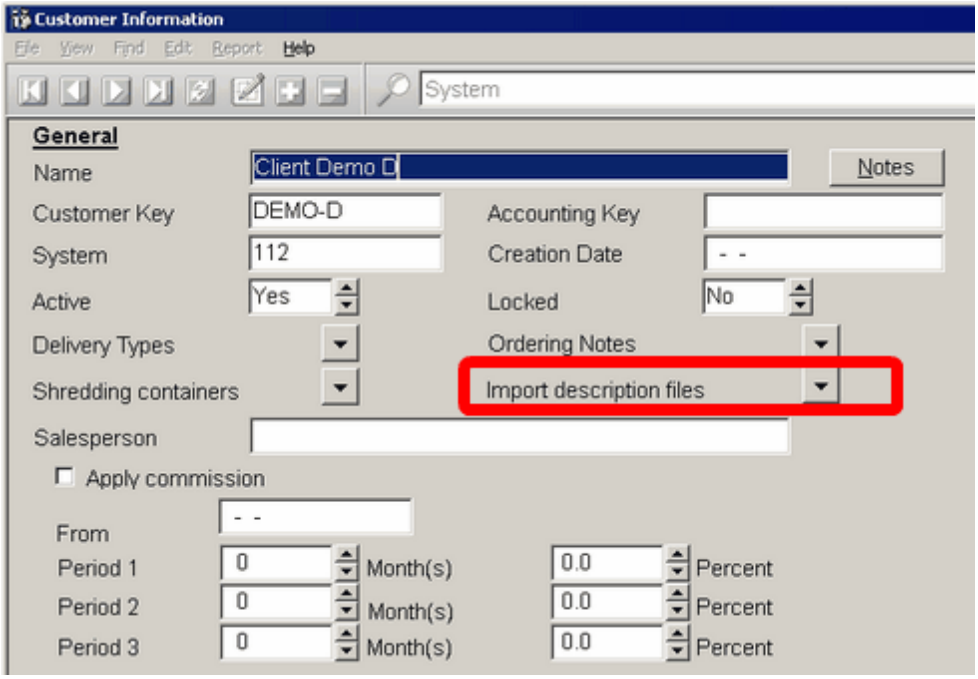
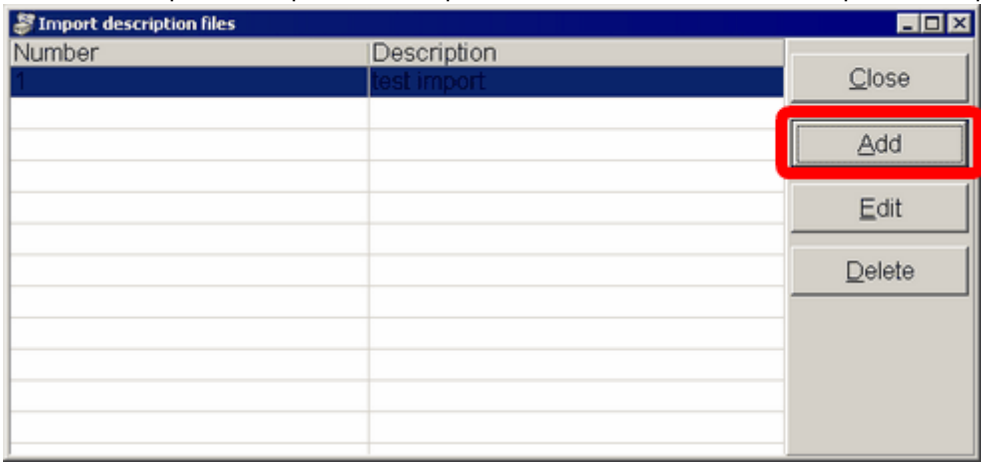
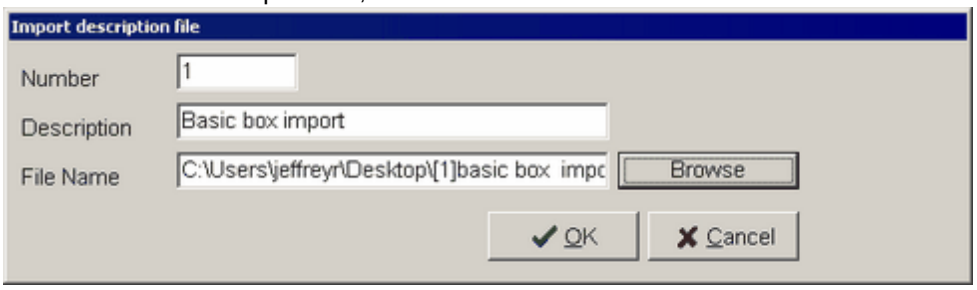


4. Click the Import description files drop down. A list of associated description files appears.



5. To add a new description file, click the **Add** button



6. Fill in the fields, then click the **OK** button.

- The number should be unique within the customer account, and will be used to tell the import which template to use. Before sending the customer the template, rename the template to include the number of the template in square brackets. (e.g. "[1]Box data for import to ActiveWeb.xls")
- The description is for your use. You can associate multiple templates for boxes or files, so the description should help you to distinguish between them.
- You may browse or enter the path to the import description file.

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Ensure that the user is set up with the required web access rights and license

- The import functionality is available to any level of web license.
- To import data, the user must have access to the Import module, either via a user group[313] that they are part of, or as an additional module[306] specified for that specific user.

For more details, see the related video tutorials.

Train the customer on importing their data.

For details, see the related video tutorials

6.1.4.9 Setting up a customer to use Imaging

1. Set up the customer to use ActiveWeb.[127] They will require Imaging or Active+EDM -level web licenses.
2. In the **Customer->Customer Information**[248] module, ensure that the customer has access to an imaging delivery type.
3. In the **Customer->Authorized User module**[304], ensure that users who will placing orders for imaging have and e-mail address, and access to the imaging delivery type - either through the User Groups[313] they belong to, or as Additional Delivery Types.

When you receive an order, perform an Imaging on demand delivery[178].

6.1.4.10 Setting up a customer for shredding service

Configure the record center to provide shredding services

1. Identify the container types and services that you will offer.
2. In the **Accounting->General Pricing** module, define price codes[739] to map to each shredding operation for each container type.
3. In the **Inventory->Shredding Container** module, define shredding containers[582] for emptying and rotation using these price codes.
4. Print and apply labels[582] for the shredding containers.

Configure the customer to receive shredding services

1. If pricing differs from general pricing, override price codes[746] in the **Accounting->Customer Pricing** module. If contracts are identical, this may be done by copying from an existing customer[747].
2. In the **Customer->Customer Information** module, use the Shredding containers[249] drop-down field to select containers to make available to this customer.
3. If appropriate, add recurring orders[683] for shredding service

You are now ready to provide this customer with shredding service, in which you will rotate or empty shredding containers[176] at the customer site with the aid of the PDT.

6.1.4.11 Open shelf file storage

Open shelf storage refers to the storage of files on shelves rather than in boxes. This service is commonly performed for healthcare providers who store medical records.

If you provide such services, the following price codes must be configured[99] for the customers requiring this service:

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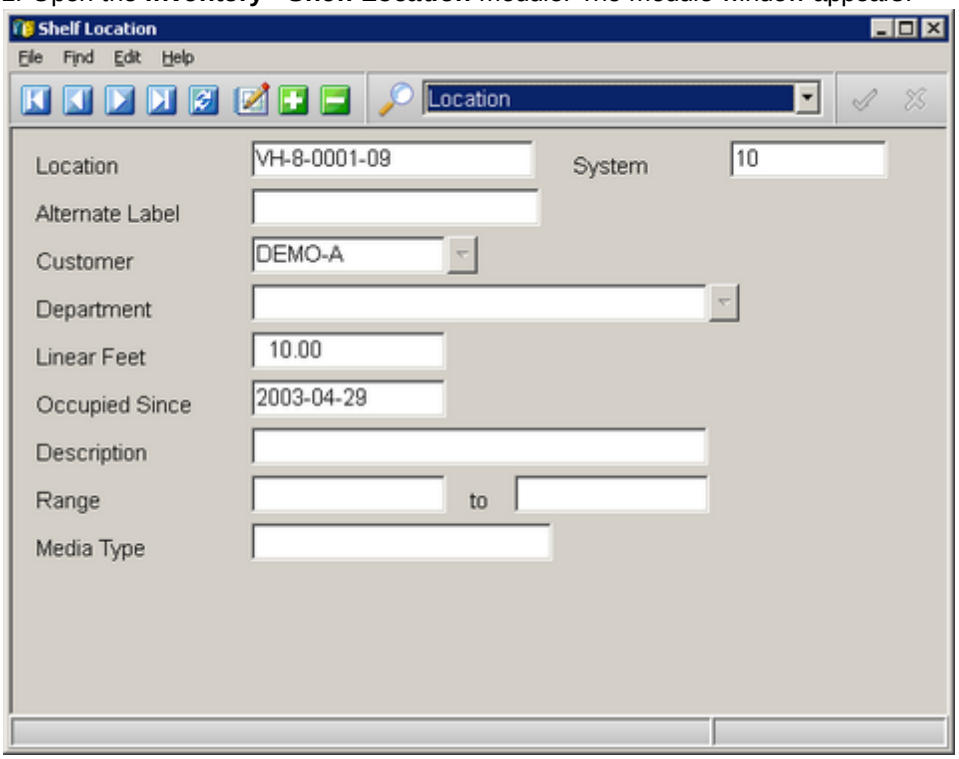
Price code	Purpose
EAOR	Addition of an open shelf file
ETOR	Open shelf storage (usually by linear foot)
OIAC	Non-inventoried open shelf accession
OIFN	Inventoried open shelf file return and accession
OIFR	Inventoried open shelf file retrieval
OSDL	Open shelf file delivery (if courier billing is by item type)
OSRT	Open Shelf Return Price Code (if courier billing is by item type)

Next, we will create and label some open shelf locations to use. As with box locations, we can add locations individually by filling in the form, or we may use a pattern to auto create many locations as once.

To add shelf locations individually:

1. Open the **Inventory->Shelf Location** module. The module window appears.



2. Press the **Insert** key or click the '**+**' button.
3. Fill in the details for the first location:

Field	Purpose
Location	This must fit the location mask and should allow efficient picking (see Guidelines for efficient picking 93)
Alternate Label	This will be left blank, unless you have location bar codes from a previous system.
Customer / Department	Select the customer, and (if necessary for billing), the department that this location will belong to.
Linear Feet	This is used in calculating storage charges

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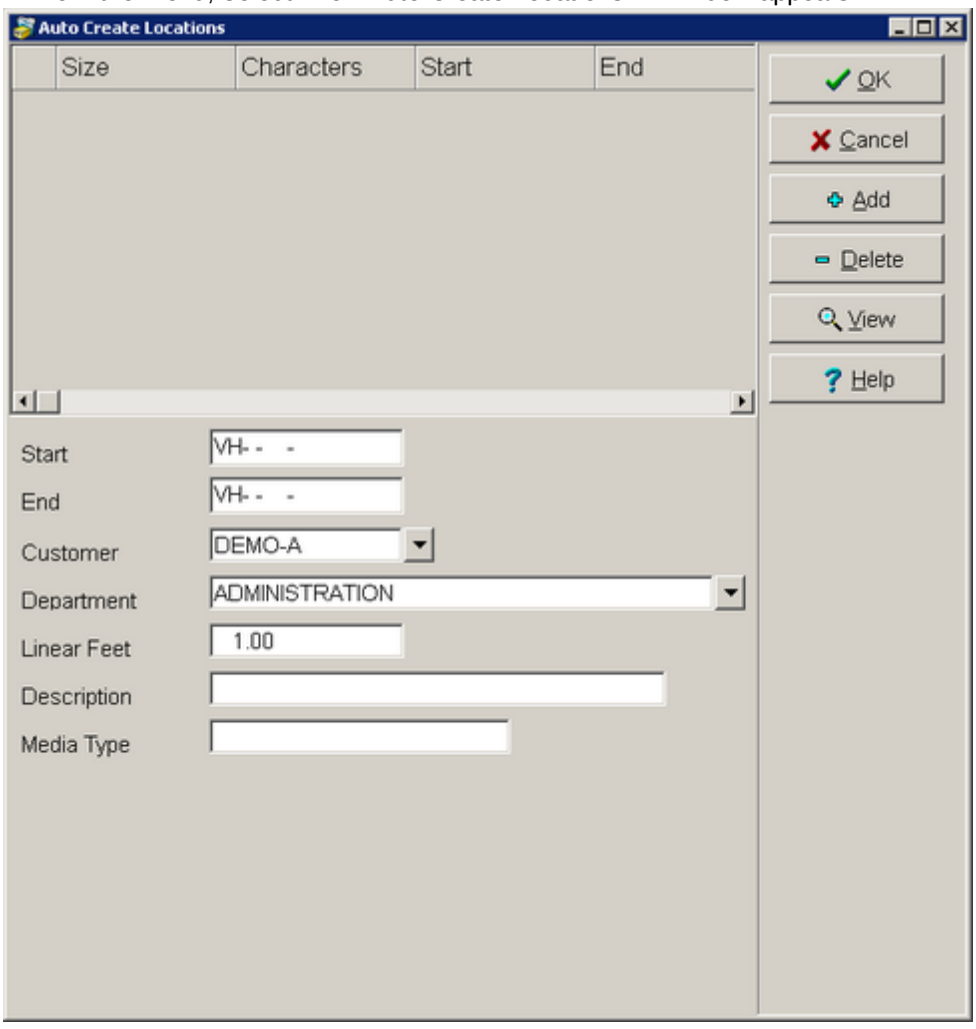
Field	Purpose
Occupied since	This field cannot be modified and is the date that location is first occupied and becomes billable to the customer
Description, Range, Media type.	These fields are for reference and are not required. examples of media types might be "x-rays" or "patient files".

4. Press **Ctrl**-**Enter** or click the green **accept** button when done with the first location. The location will be created.
5. EDC will automatically start creating another identical record.
6. Continue modifying and accepting records (By pressing **Ctrl**-**Enter**) until you are done adding locations.
7. Press the **Esc** key, or click the red **X** to cancel once you are done adding shelf locations.

Auto-creating shelf locations

This function allows the creation of many shelf locations in the same operation. It is virtually identical to auto-creating regular storage location.

1. Open the **Inventory->Shelf Location** module.
2. From the menu, select File->Auto Create Locations. A window appears.



3. In the lower section, fill out the properties of the location (see field descriptions above).

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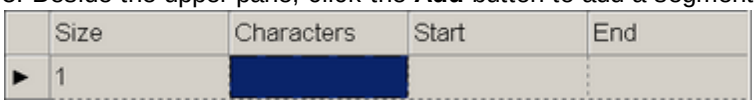
4. Using the **Start** and **End** fields and upper panel, define the pattern for the locations to be created:

5. Beside the upper pane, click the **Add** button to add a segment. A segment is added to the top panel.



You will break the location addresses into segments and define the pattern for each segment.
Each segment should either be constant, or be established by a simple counting pattern.
For example, if all of the locations that you are creating are on the same picking level, (Say "01"), then the size of the first segment would be 2, the characters required would be (0,1), the segment would start at 01, and would end at 01.

Note that the "building" segment does not need to be specified, since you can only create locations for the building that you are in, therefore it will always be the same.

1. Click the value in the **Size** column twice to edit it. Enter the number of characters in the segment (egg. 2 for picking level.)
2. Click the value of the **Characters** column twice to edit it. This will tell the function how to count. For example, if you want to create aisle A, B, C, you would enter these characters. If you are creating even number shelves, a segment might use the characters 0,2,4,6,8, in which case shelves 01, 03, etc would not be created with this operation.
3. Click the value in the **Start** column twice to edit it. (and you will do the same for **End**). Enter the start and end values for the segment to be used. (egg. if you are creating shelf 01 to 06, enter 01 for start, and 06 for end.)
4. Repeat for all remaining segments.

Once all segments have been entered in this way, the total of the Size column should add up to the length of the location mask, minus the length of the building segment and the number of separator characters (egg, dashes.)

5. Click the **OK** button. The list of locations to be created, including the total count will be displayed.
6. Review this to ensure that it makes sense, then close the report.
7. A dialogue window will prompt "Confirm?". If you click **Yes**, the locations will be created.

If you run the Auto Create Locations function again from the same module window without closing it, the settings will be conserved. Repeat for the next batch of locations to create.

Note : Locations can only be auto-created for the building where the operation is initiated from. The building code displayed by default at the beginning of the location mask (Start and End fields) is the code of the building in question and cannot be changed.

Rules for auto-creation

In the following example, the interval of locations to be created is VH-9-0201-01 to VH-9-0303-06. The building's code (VH) and the hyphens (-) are not considered, so 7 characters will be considered when creating the sequences (9020201 to 9030306).

Here are the chosen sequences :

- The first two characters must be unmodifiable (VH-**9**-**0**201-01 ... VH-**9**-**0**303-06).
- The third character must be incremented one character at a time (VH-9-0**2**01-01... VH-9-0**3**01-01 ... VH-0**4**01-01).

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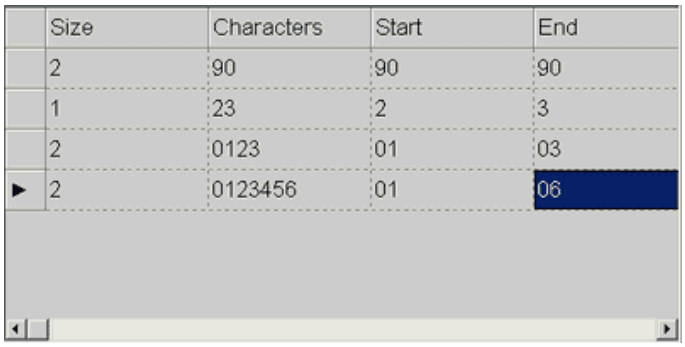
- The characters 4 and 5 must be incremented together, one pair at a time, from 01 to 04 (VH-9-02**01**-01 ... VH-9-02**02**-01 ... VH-9-02XX-XX ... VH-9-02**04**-01 ... VH-9-03**01**-01).
- The last two characters must be incremented together, one pair at a time, from 01 to 06 (VH-9-0201-**01** ... VH-9-0201-**02** ... VH-9-0201-XX ... VH-9-0201-**06**).

Here are the parameters which have to be entered, in order to create properly the chosen sequences (each line corresponds to one of the 4 points described above) :



	Size	Characters	Start	End
	2	90	90	90
	1	23	2	3
	2	0123	01	03
▶	2	0123456	01	06

Size : allows to enter the size of the sequence, such as "1" when the character is alone or "2" when it is a pair, etc.
Characters : allows to enter the possible values for the characters of the sequence.
Start : allows to enter the minimum value for the sequence.
End : allows to enter the maximum value for the sequence.

Here are the locations created :

VH-9-0201-01	VH-9-0202-01	VH-9-0203-01
VH-9-0201-02	VH-9-0202-02	VH-9-0203-02
VH-9-0201-03	VH-9-0202-03	VH-9-0203-03
VH-9-0201-04	VH-9-0202-04	VH-9-0203-04
VH-9-0201-05	VH-9-0202-05	VH-9-0203-05
VH-9-0201-06	VH-9-0202-06	VH-9-0203-06
VH-9-0301-01	VH-9-0302-01	VH-9-0303-01
VH-9-0301-02	VH-9-0302-02	VH-9-0303-02
VH-9-0301-03	VH-9-0302-03	VH-9-0303-03
VH-9-0301-04	VH-9-0302-04	VH-9-0303-04
VH-9-0301-05	VH-9-0302-05	VH-9-0303-05
VH-9-0301-06	VH-9-0302-06	VH-9-0303-06

The first time an inventoried file is placed on a shelf, the bar code of the file and the shelf location are scanned with the bar code reader. The current date is automatically put in the Occupied Since field of the present module and the billing for this shelf location is starting. But there is a problem when storing non track files, that represent the major part of documents stored on open shelf locations.

Since this document type does not have a bar code label, when storing a non track file for the first time on a shelf it is not possible to register the operation and to start the billing for the current shelf location. That is why the present operation was created, in order to allow the record center to manually indicate when a shelf location is used for the first time in that particular situation.

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In the same way, the record center can manually indicate the final retrieval of all the non track files stored on a same shelf location, so that the storage fees must not be charged anymore.

1 Click on **Inventory**->**Shelf Location** from the Main window.
2 Search the shelf location to which the non track files are inserted or final removed.
3 Click on **Edit**->**Set EMPTY|Set OCCUPIED**. Accordingly to the operation that is performed, the system automatically puts the current date in the Occupied Since field or delete any date that was present in it.

Note : When there are documents left on the shelf location, it cannot be marked as being empty. It is necessary to transfer all these documents by creating an internal transfer list.

7 Technical topics

7.1 Deploying rcMobile

rcMobile is an HTML5 browser-based application for performing record center operations. In version 6.25 you can perform the following operations using rcMobile:

- Packaging and Truck validation during delivery preparation.
- Delivery.
- Returning deliveries and unloading trucks.

In the future, all internal warehouse operations will also be supported, including picking, refiling, and disposal.

You may deploy it using a wizard, much like ActiveWeb. If you wish to use rcMobile over wifi, please consult with your network specialist to ensure that your configuration is secure.

Introduction to rcMobile in EDCRC: Part 1 - deployment

Deploying rcMobile:

(Please perform this operation from a computer that has the JDK installed on it. Contact support@docudatasoft.com if you require assistance.)

1. From the menu of the **Management->System Information** module, select File->Deploy rcMobile.
2. The **Start** window of the wizard appears. Click the **Next** button to continue.
3. The **Tomcat** window of the wizard appears. Enter the internal path to your **tomcat host** (e.g. http://localhost:8080), and a user name and password to access tomcat. (e.g Admin, ...). Your network administrator should know where to find this information. Click **Next** to continue.

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4. The **RPC server** window appears. Enter the machine where your RPC server is running (e.g. localhost), the port (usually 1103), and whether or not it is SSL encrypted over your internal network (it is typically not). Click **Next** to continue.
5. The **Application** window appears. In the **WAR file to deploy** field, navigate to the bin folder of your EDCRC installation and select **rcmobile.war** to deploy the latest version. In the **application name** field, enter the name that you wish to deploy the application with (e.g. rcmobile). Click the **Next** button to continue.
6. The **Options** window appears. If you wish, you may alter the color scheme to use. Click the **Next** button to continue.
7. The **Images** window appears. You may modify images used by rcMobile by navigating to the specified folder and replacing an image with an image of your own that has the same name and similar dimensions. Click the **Next** button to continue.
8. The **Deploy** window appears. Click the **Next** button to deploy rcMobile on your web server.
9. If there are currently active rcMobile sessions, EDCRC will warn you. Click **Yes** to complete the deployment.
10. The **Finish** window appears, alerting you that "*The deployment of rcMobile completed successfully.*"

To access rcMobile, connect to your web server using a browser that supports HTML 5 on a computer or mobile device.

If your address for connecting to ActiveWeb is www.mydomainname.com/activeweb, your address for rcMobile will likely be www.mydomainname.com/rcmobile. Depending on how your network is configured, you might use a different address depending on whether you are accessing rcMobile from inside or outside your network.

7.2 Setting up a new workstation

Record centers commonly add additional workstations or upgrade their hardware as they grow. This workstation must have network access to the server on which the EDC RC database and program reside.

Details are available in the **"EDC RC Install and Technical Manual"**, and additional resources are available through www.docudatasoft.com and knowledge-base articles at client.docudatasoft.com.

The key EDC-specific steps are as follow:

1. Install and configure the database engine. DocuData currently uses Pervasive for this purpose. The pervasive installer will guide you through this process.
2. Copy over a shortcut to start EDC RC (docu32.exe)
3. Add a DSN. The name is EDC_RC, and it should point either to the EDC RC data folder on the server. We typically name the database EDCRC.
4. For printing paper documents, ensure that your operating system's default windows printer is appropriate. This setting is taken from the operating system whenever you launch EDC RC.
5. Thermal printer and PDT communication port settings are taken from the dc.cfg file that can be specified in the shortcut used to start EDC RC. If this computer has a different configuration, you may wish to copy an existing folder in the Config folder of your EDC RC installation to create a new dc.cfg file to point at.

7.3 Testing PDT communication

If you ever need to see the information being sent by the PDT to the IrDA port (either to the computer or an IrDA printer), you may do so using the Appload utility used for programming the PDT.

- Launch Appload
- Ensure that the com port setting is correct, using the **Settings->Port menu**.

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- From the menu, select **Utilities->Show RS232 data**
- Use the PDT menus to initiate the desired "send" operation.

7.4 Technical set-up settings in various module

Technical set-up is best done by a network administrator who is familiar with your network. Many technical topics are addressed in a separate document, EDC RC Install and Technical Manual.pdf, which can be found in the in the same folder as EDC RC (Docu32.exe).

However, you will want to make sure that the following topics are addressed:

Set-up step	Suggestion	Notes
Set up database engine on server		
Set up DSN		
Install EDC RC on server		
Configure services		
Set up SMTP settings		
Set up ActiveWeb		
Configure local and remote back-up of EDC.		
Set up workstations 137 Including printers, PDT cradles, Document scanner, DSN for report access.		
Set up order checker on one or more workstations		

There are also several settings in the system information module that your network administrator can help you with:

Open the system information module in edit mode.

1 Click on **Management->System Information** from the Main window.
2 Click on **Edit->Edit**.

Field	Suggestion	Notes
Low disk space warning (MB)		Warns if the available space on the disk hosting the database drops below this amount. Hosting images and documents can take a lot of space.

***Replication**

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Field	Suggestion	Notes
DocuData RPC server		services.docudatasoft.com :443
Client installation folder		Directory where the customer data will automatically be exported, when using the ClientInstaller.exe application.
RPC server at RC		External address (URL) for ActiveFile replication.
Internal LAN		Internal address for RPC server used for ActiveFile replication
Web RPC server		Internal address for RPC server used for ActiveWeb

***Imaging**

Field	Suggestion	Notes
Image directory		Location for internal storage of images. This field can be set using the **Edit->Image directory** 385 function. Please contact DocuData support if you wish to change this.
Image server, port		Default port is 11000
Documents directory		Directory for use by the Electronic Document Management level of ActiveWeb, for storing the customers electronic documents. This folder may grow to occupy a lot of disk space.

***Record Center**

Field	Suggestion	Notes
SMTP Address, Port		
SMTP User Name, Password		
ActiveWeb URL		This is address of ActiveWeb on the internet. A link to this site is included in e-mail notification that imaging orders have been fulfilled
Invoice email BCC		You might want to set up a separate e-mail address for copying e-mailed invoices to.
Invoice email reply to		This should be a monitored e-

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Field	Suggestion	Notes
		mail, as it will catch delivery failure notices.

For additional details, see the EDC RC Install and Technical Manual.pdf mentioned above.

8 Procedures and training manual

The following topics provide details on common procedures performed by a typical record center using EDC RC. They are intended for training purposes and as a guideline that can help you with your operations manual.

Because your own record center may be configured differently, it is important to test your own procedures and document them in your own operations manual[72], which will be your authoritative reference for procedures in use at your record center.

8.1 Training Introduction

Hello, and welcome to EDC RC. At DocuData we pride ourselves on the quality of our records management solution. This includes the software, the operational procedures it supports, the customer service tools that it enables, and also the quality of the partnerships that we have with you. Our general rule is that if it takes you more than 5 minutes to figure something out, send support@docudatasoft.com a quick e-mail, and we will be happy to help point you in the right direction.

Included with EDC RC is a minimum of one week of training. If you have a relatively small and focused team, training typically takes place in Montreal, Quebec, Canada, where we have access to the facilities and staff of a successful record center that has grown from a new use for an old storage building into a highly efficient company with a second state-of-the-art, purpose-specific building. If you have more staff that requires training as well as existing facilities that require analysis and on site configuration, then our trainers may also come to you. Either way, we train you so that you are ready to run your business with EDC RC, and we continue to support you as you grow.

The purpose of this training section of the manual is three-fold.

1. To serve as an introduction for those prior to being trained on EDC
2. To serve as a review for those who have been trained, and a tool for helping to share this knowledge with new colleagues
3. To serve as a guideline in introducing new features as you grow, and as a resource in building your own operations manual.

Note that EDC is very flexible and can accommodate many different operational methods. This manual will describe one method, in order to illustrate fundamental concepts. Your record center should have its own internal operations manual that you should follow for existing procedures.

If you are trying out a new procedure, we strongly recommend working with your demo customer account in order to verify that you will achieve the desired effects given your own unique configuration.

To become familiar with the modules in EDCRC's employee interface and how to navigate within and between them, please see the following video:

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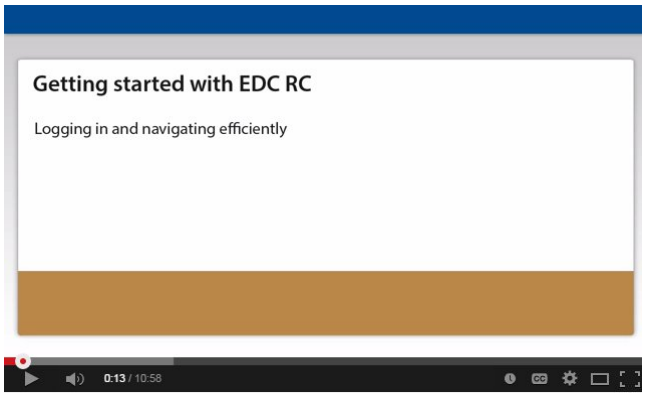
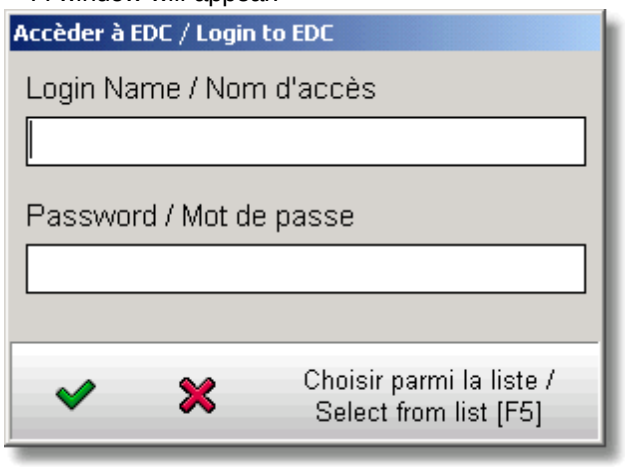


Navigating in EDCRC

8.2 Getting Started

EDC RC requires users to log in using their employee profile. This will determine which modules and rights they have access to, and will permit the system to keep track of who performed which operation such as performing data entry or taking an order over the phone.

1. If a login window is not already present, double-click the box and file shortcut to activate **Docu32.exe**. A window will appear.



2. Type the login name and password and press enter, or press the F5 key to select from a list, in which case a window will appear.

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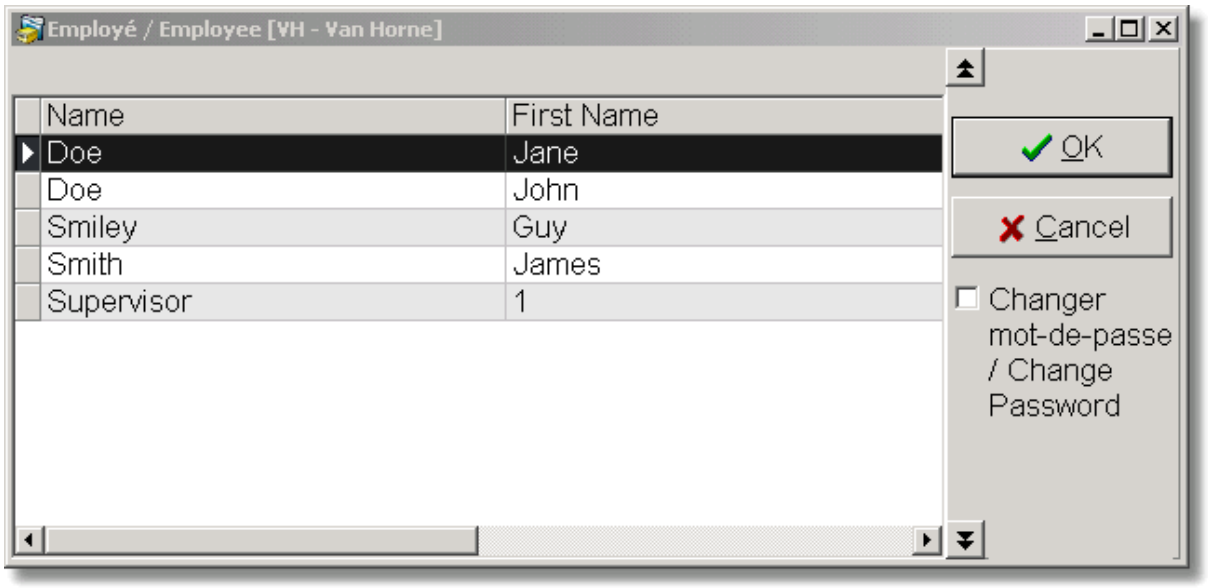
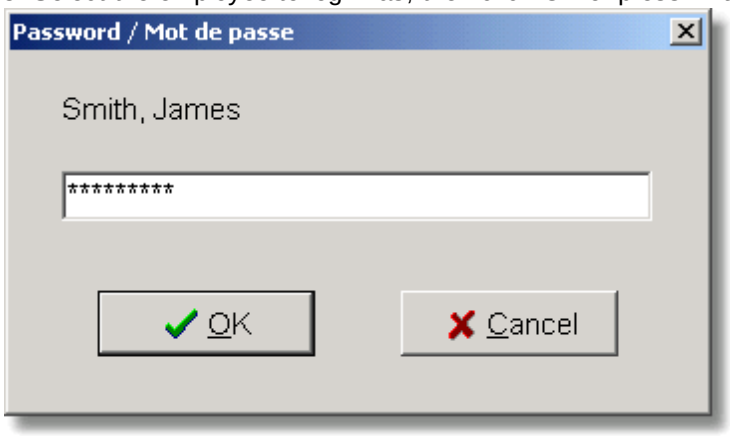


3. Select the employee to log in as, then click **OK** or press **Enter**. A window will appear



4. Enter the password, then click **OK** or press **Enter**. If the password is correct, you will arrive at the Main Window of EDC RC.

Trouble-shooting

- If the EDC RC icon is absent from your workstation, have your system administrator install it for you. Instructions can be found in the Technical Manual.
- If you encounter an error message before the login screen appears, have your system administrator determine whether Pervasive is properly installed on your workstation.
- If you encounter a long delay while waiting for the login screen, have your system administrator verify that you have enough licenses for Pervasive. Closing EDC RC on a computer that is not in use may resolve this.
- If your profile does not appear in the list of employees authorized to access EDC RC, have your supervisor verify that you have a profile and that it has not expired. Note that repeatedly entering incorrect passwords will cause your profile to expire.

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8.3 Order processing

8.3.1 Overview of order processing

DocuData provides you with editable procedure documents (sometimes called SOPs) that you can use as a starting point for customizing your own documents. We will be adding links to those documents here in a future update of this manual.

The key documents for order processing cover:

1. Order entry
2. Picking
3. Delivery preparation
4. Delivery and return
5. Refiling and quality control

For a detailed overview of order processing with rcMobile, see Overview of rcMobile 214

To help you keep track of how far along in the process each order is, the orders and deliveries progress through different states as follows:

<table>
<tr><th>Action</th><th>Outgoing items status</th><th>Incoming items status</th><th>Order status</th><th>Delivery status</th></tr>
<tr><td>Request placed for barcode labels (order is placed and barcodes are printed)</td><td>PRE ADD</td><td>N/A</td><td rowspan="2">(Has a number)</td><td rowspan="3">N/A</td></tr>
<tr><td>Orders placed to pickup boxes from the client</td><td>N/A</td><td>OUT or PRE ADD (customer site)</td></tr>
<tr><td>Orders placed to deliver items to client</td><td rowspan="2">SELECTED</td><td rowspan="5">N/A</td></tr>
<tr><td>Pick</td><td>BEING PICKED</td></tr>
<tr><td>Delivery creation (picking incomplete)</td><td rowspan="8">OUT</td><td>GROUPED</td><td>CREATED (repeat delivery creation to close.)</td></tr>
<tr><td>Delivery creation (picking complete)</td><td rowspan="7">Affected orders are CLOSED</td><td>CLOSED</td></tr>
<tr><td>Truck validation</td><td rowspan="2">ON TRUCK</td></tr>
<tr><td>Delivery and Return of items with PDT</td><td>OUT or PRE ADD (customer site)</td></tr>
<tr><td>Return of items</td><td rowspan="4">IN</td></tr>
<tr><td>Moving files to transit locations and boxes to holding locations</td><td rowspan="2">RETURNED</td></tr>
<tr><td>Refiling items</td><td>VERIFIED</td></tr>
<tr><td>Refiling verification</td><td>If some items have not been scanned to a final location, the delivery will remain RETURNED status</td></tr>
</table>

* grey background indicates actions or items may be at the customer site.

8.3.2 Overview of shredding

- For recurring service, set these up in the recurring order module.
- For purge orders and individual requests, set these up through the orders module, using the shredding calendar
- Schedules can be adjusted and routes can be managed through the delivery maintenance or delivery

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route module.

- During truck validation with rcMobile, drivers receive a list of the quantity of bins of each type required for their route.
- Driver performs delivery with rcMobile, selecting the recipient
- Driver performs bin emptying and rotation
- Driver performs any purge shredding or collection, adjusting items and quantities if necessary
- Recipient confirms service
- If COD, recipient provides payment.
- rcMobile issues receipt, and if shredding on site, certificate of destruction. all by e-mail.
- On returning to the record center, driver "unloads" vehicle, terminating the route

- Returns and adjustments are made if necessary.
- For off-site (plant-based) shredding, completion can be manually verified. More automation will follow in a future update.

8.3.3 Outgoing and incoming items

Many of the daily operations at a record center revolve around the movement of box and files in response to customer orders. Between the creation of a record and its ultimate disposal, it may pass through various states, as illustrated in the following diagram.

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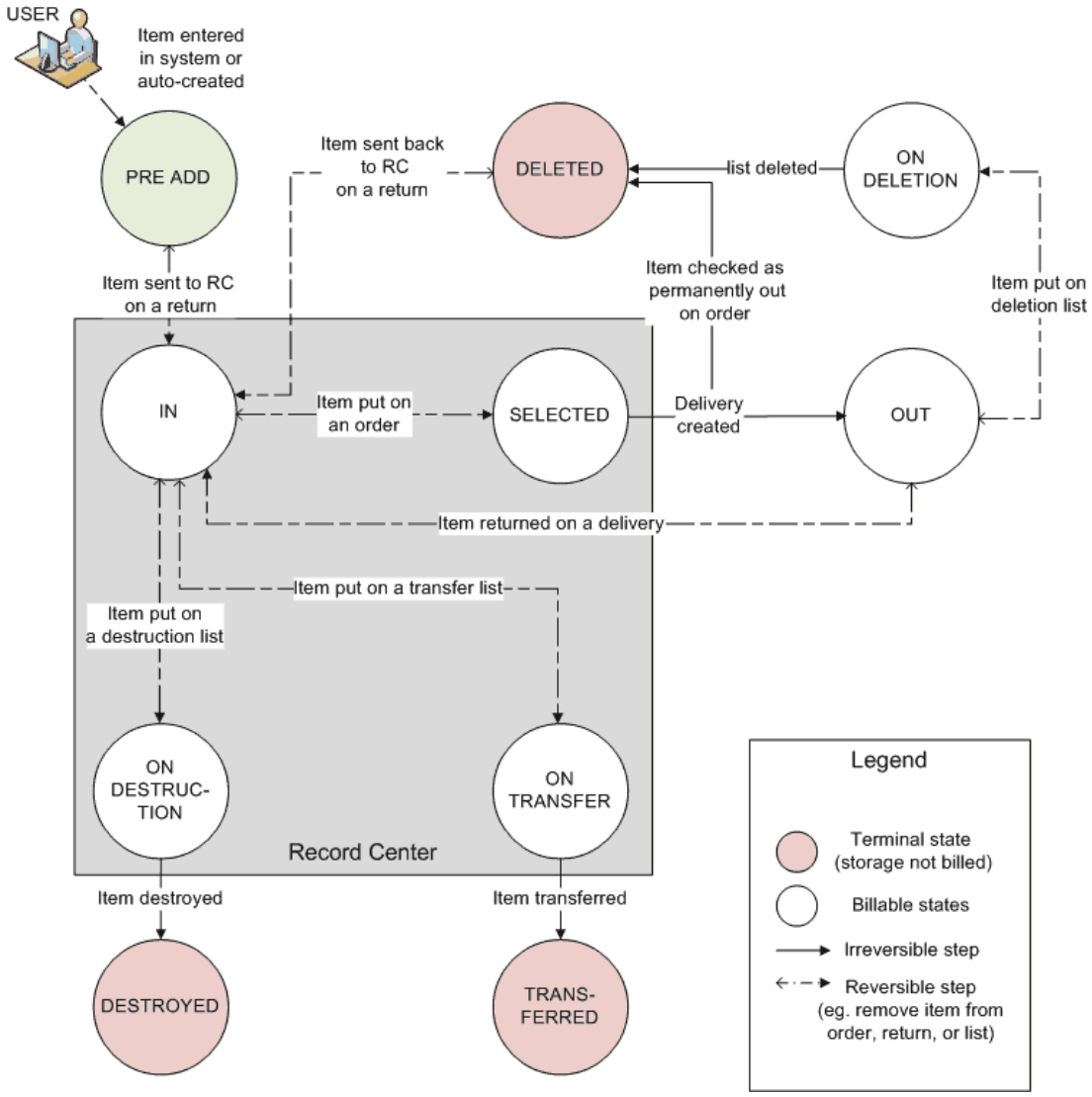

Circulating states

State	Description
PREADD	New items that have records in EDC but have never been in the record center (or processed in-house by a customer with ActiveFile) are in the PRE ADD state Record centers frequently issue pre-printed thermal labels for customers to affix to their new boxes by auto-creating boxes in PRE ADD[427], creating box records that customers can then modify through ActiveFile or ActiveWeb.
IN	When the item are brought into the record center on a return, the state is changed from PREADD or OUT to IN. Items that are in the record center must have a location. Items coming from PREADD acquire the size (box type) of the first location that is not a transit location that they are moved to.
SELECTED	When an item is placed on an order it becomes SELECTED, to

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State	Description
	prevent duplicate orders.
OUT	The status of an item selected on an order changes to OUT when the associated delivery is closed. Items that are OUT have a recipient.

Terminal States, and states leading to them

State	Description
ON TRANSFER	If items are to removed from inventory and transferred permanently to another location, their state becomes "ON TRANSFER" when placed on the list, and "TRANSFERRED" once this list is processed.
TRANSFERRED	
ON DISPOSAL	If items that are in the record center are to be destroyed, their state becomes "ON DISPOSAL" when placed on the list, and "DESTROYED" once this list is processed.
DESTROYED	
ON DELETION	If items that are OUT are to be removed from inventory, their state becomes "ON DELETION" when placed on the list, and "DELETED" once this list is processed.
DELETED	Items may also be deleted by checking the "Permanently Out" option while placing an order. Deleted items may be accepted back into inventory if they are return to the record center.

8.3.4 Order entry operations

The circulation process starts with the creation of orders. Orders will be assigned a delivery date and time based on the delivery type chosen.

It is worth noting that deliveries and orders are separate concepts in EDC RC. Unless the option to group orders is turned off, multiple regular and by date orders for the same delivery cycle and delivery address may be grouped onto a single delivery at the time of delivery creation if the delivery types use the same price codes. Therefore, if a customer calls back and requests more items, you may simply place a second. If appropriate, they will be delivered together.

Orders may be created in several different ways.

1. Through the order module in EDC RC 147
2. By the customer (or the record center) via ActiveWeb. (See ActiveWeb documentation)
3. By the customer through the order module of EDC ActiveFile (See ActiveFile documentation)
4. By a recurring order 161
5. By a rotation schedule 165
6. Through an electronic submission to the EDC RC order processor. (Contact support@docudatasoft.com)
7. Through the "Daily Returns" option for a delivery address 331 (Rarely used)

No matter how orders are entered, they will appear in the orders module, and they will be treated similarly in picking and subsequent steps.

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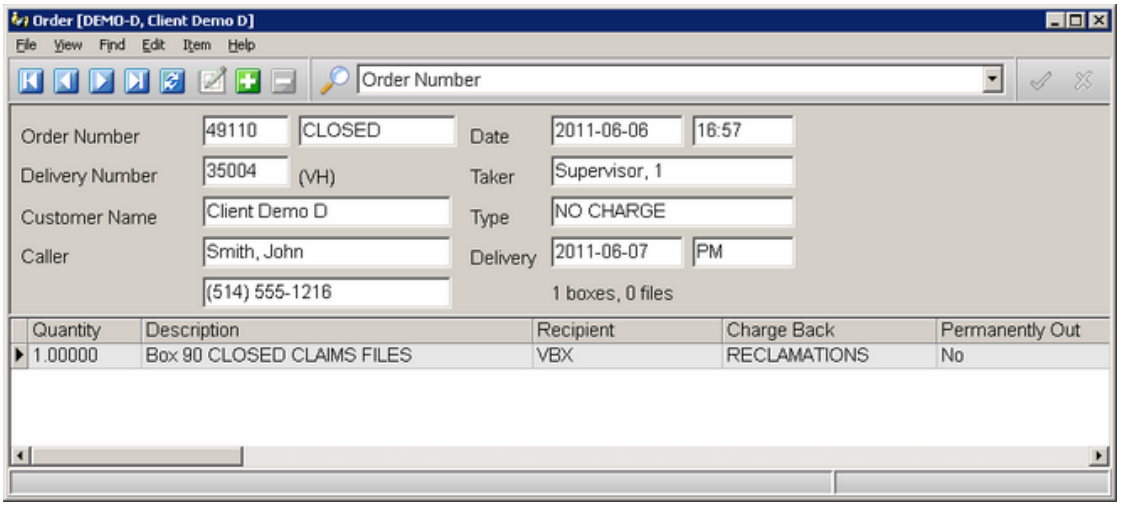
8.3.4.1 Introduction to the Order module


Order [DEMO-D, Client Demo D]
File View Find Edit Item Help
Order Number
Order Number 49110 CLOSED
Delivery Number 35004 (VH)
Customer Name Client Demo D
Caller Smith, John
(514) 555-1216
Date 2011-06-06 16:57
Taker Supervisor, 1
Type NO CHARGE
Delivery 2011-06-07 PM
1 boxes, 0 files
Quantity Description Recipient Charge Back Permanently Out
1.00000 Box 90 CLOSED CLAIMS FILES VBX RECLAMATIONS No

The order module is the first module on the Orders tab. When first opened, it opens to the most recently placed order, in browse mode.

Fields	Notes
Order number	Order numbers are sequential and automatically assigned by the system. To the right, the status field may be blank (created), being picked, grouped, or closed. Orders in the blank (created) state can easily be deleted. Once work has begun, the order cannot be deleted, but you can exclude items and cancel charges.
Date	The order date and time are stamped when the order is accepted (terminated.)
Delivery number	Assigned when the delivery is created. Note that this number will generally be lower than the order number, as multiple orders may be grouped onto one delivery. (To the right, in brackets, is the building number associated with the delivery.)
Taker	This indicates how the order was placed. If it was entered through the order module, this will be the employee who was logged in. If it says "Customer", this indicates that the order was placed directly by the "Caller". Other options include "Recurring Orders".
Customer name	Name of the customer account.
Type	Delivery type
Caller	Name of the Authorized User
Delivery	Scheduled delivery date and time.
(unlabeled)	Phone number of the authorized user. Note that the presence of a yellow watch icon to the left of this field would indicate that the order was processed using the "Pick and run" function.

Columns	Notes
Quantity	This area list items on the order, and various parameters related to those items.
Description	

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Columns	Notes
Recipient	
Chargeback	
PermOut	

Related topics

Placing an order in EDC RC 147
Overview (Order) 588
Fields (Order) 590
Entering an order 591
Entering a purchase order 599
Entering a fast order 599
Picking and delivering an order immediately 602
Adding items to an order 602
Adding special instructions to an order 614
Editing an order 615
Edit Perm Outs 616
Deleting an order 617
Printing thermal labels 617
Viewing information about the current order 618
Viewing or printing reports 619

8.3.4.2 Placing an order in EDC RC

There are many ways of creating orders in EDCRC. The following procedure describes manually adding an order directly in EDCRC, typically due to a communication from the client - though you may also create orders simply for billing purposes. Other ways of creating orders include:

- Having clients submit orders themselves, using ActiveWeb or ActiveFile
- Having a client's automated tape management software or external records management system place an order via FTP using EDCRC's order processor
- Scheduled orders created automatically by EDCRC based on a tape rotation schedule or return date.
- Scheduled orders created automatically by EDCRC through the recurring order module.
- Daily pick-ups scheduled through the delivery address module

All of these orders show up and can be reviewed if necessary through the Orders->Order module. The order taker field shows you how the order was submitted.

To create an order in EDC RC.

(Adding items to an order is discussed in the following topic, since there are many different options to consider.)

1. Open the **Orders->Order** module.
2. Click on **File->Create Order**, or press the **Insert** key. A window prompts for the customer.

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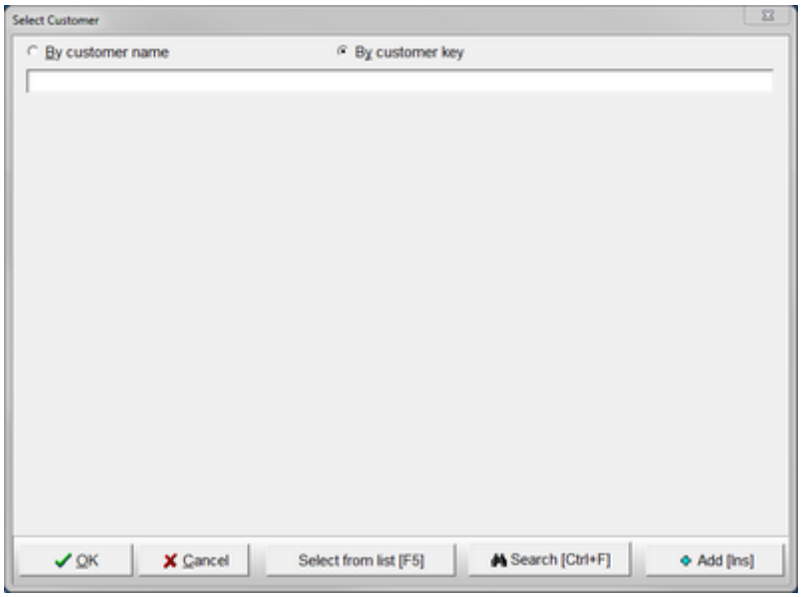


3. Create or select the desired account using one of the following options:

- Select an account by name or customer key

- To select an existing account by known customer name or key, ensure that the correct option is select, and start typing the customer key or name. You may select from the matching options.

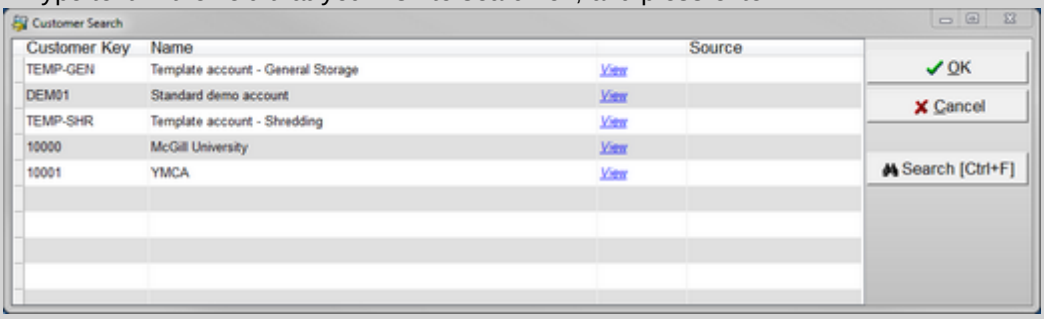
- Select an account from a list

- To select from a list, press **F5** and select from the list that appears

- Search for an account

- To search for the account, click the Search button or press **Ctrl-F**.

- Type text in the field that you wish to search on, and press enter.



- Search results are displayed, with Source indicating the field in which the result was found.
- From here you may select an account and press **Enter** or click **OK**, click **View** to see more details about the account, or press **Ctrl-F** again to refine your search.

- Add a new account using the rapid account set-up form

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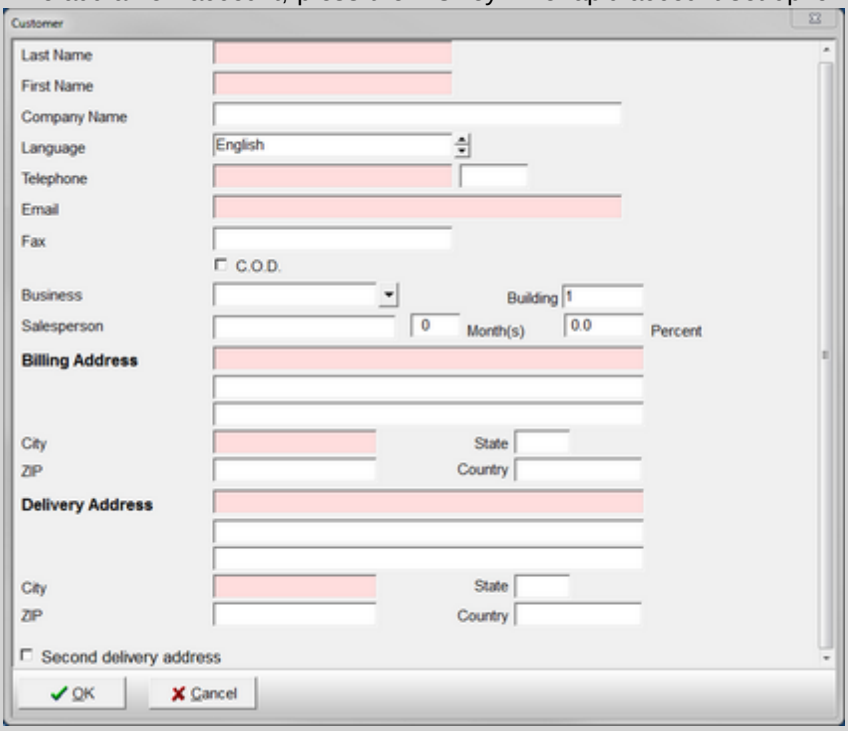
- To add a new account, press the **Ins** key. The rapid account set-up form appears.



- Fill in the values, noting that pink fields are required.
- The billing address will automatically populate the delivery address, but you can replace it if it is different.
- If you check the COD check box then your driver will collect payment from the client using rcMobile.

(Note that additional settings for the new account will be taken from the template account specified in the Management->System Information module ***)

4. Select the user who is authorizing the request and press **OK**.(If the system prompts for a password then they must provide this to complete order).
5. If prompted, enter the user's password.
6. Select one of the delivery addresses (only address that the user can access will appear.)
7. Select a delivery type and press **OK**. (This controls scheduling and billing behavior)
8. Add the desired items (see "Adding items to an order[147] " for more details. For shredding service, see)
9. Once all items have been added, press **Ctrl-Enter** to terminate (accept) entry for this order. This is equivalent to selecting **File->Terminate order**, or clicking Click on the **Accept** button.

Note: When order entry is terminated, EDC RC assigns the order an order time and delivery date, and the items appear on the picking list for that delivery period. Terminating the order before the picking cut-off is therefore very important.

If you have any problems during this process, it may have to do with user set-up. See Set up a user for an account[125] and ensure that the user is properly set up.

- "No items in selection" means that the user might not have access to any of that type of object, e.g. delivery addresses or delivery types.

Related topics

Entering an order[591]

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Adding items to an order 150

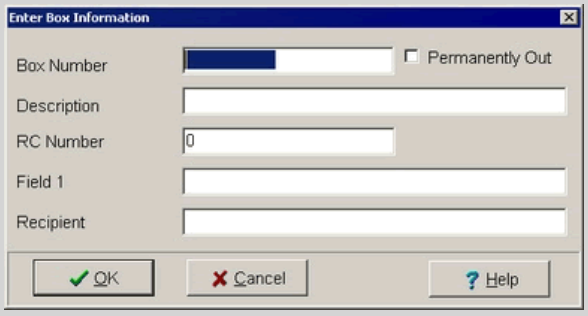
8.3.4.3 Adding items to an order

There are many options available for adding items to an order. Familiarize yourself with the methods for ordering individual file and box retrievals, line items, and returns.

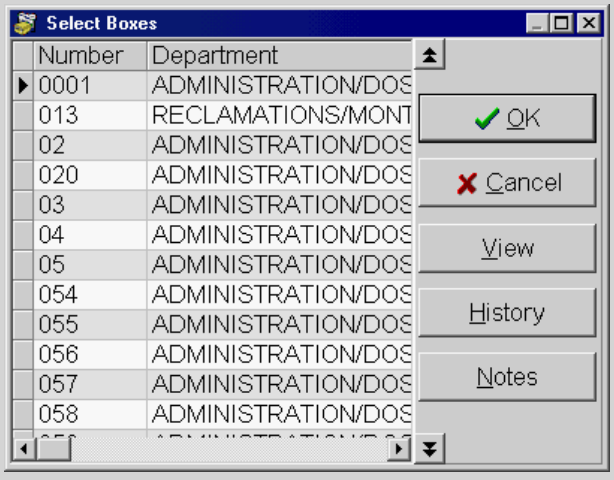
The more advanced options are used less frequently. (For example if a customer wants to order all items meeting certain criteria, you could to this using a search, or if they provide a list of box numbers in an e-mail, you can paste in this list). Once you are familiar with the basics of ordering an item, and are familiar with EDC RC in general the other options will become more intuitive.

Adding a box retrieval

1. Click on **Item->Add Item->Box Retrieval**. A window appears.



2. Enter a recipient (required). Enter value for the box number, description, RC number, or Field 1, and press **OK**. A list of boxes will appear, positioned to the specified value, sorted by the specified field.



3. Highlight the desired boxes and click on the **OK** button.

Adding a file to an order

1. Click on Item->Add Item->File Retrieval. A window appears.

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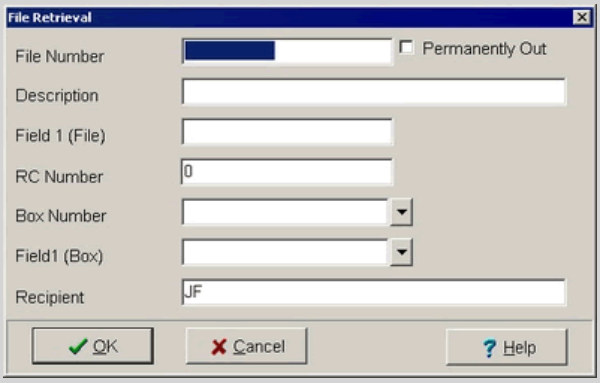


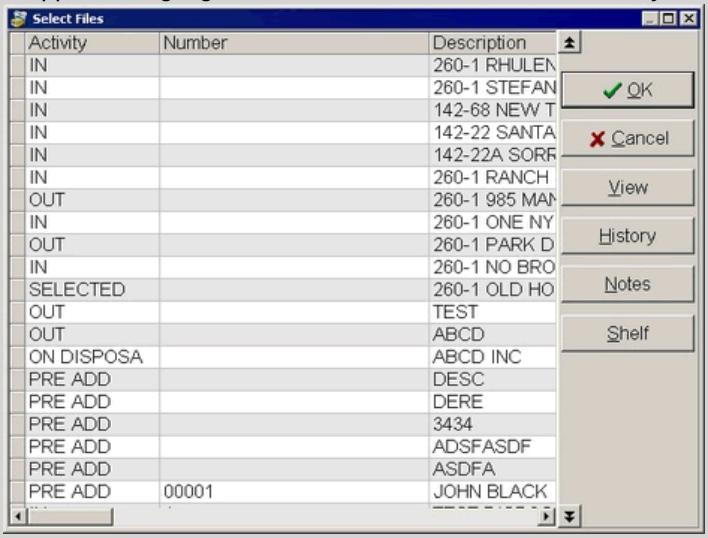
2. Enter a recipient
3. Specify the file

By File RC number:

- If have the file RC number is known, enter it and click **OK** to add it to the order.

By file number or description:

- If the file number or description is know, enter that information and click **OK**. A list of inventoried files appears. Highlight one or more files and click **OK**. They will be added to the order.



- If the file is stored open shelf and is not inventoried, click on the **Shelf** button. A window appears with criteria for specifying open shelf files.

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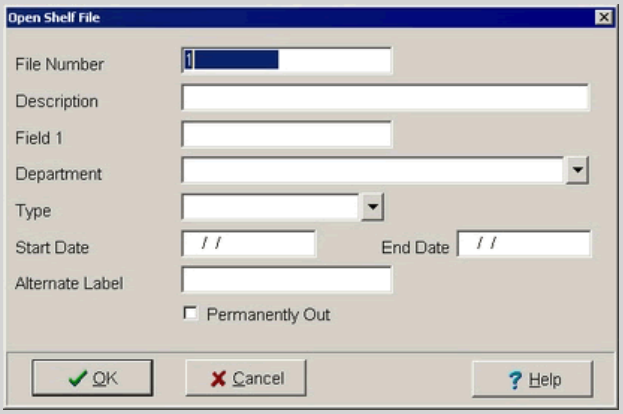
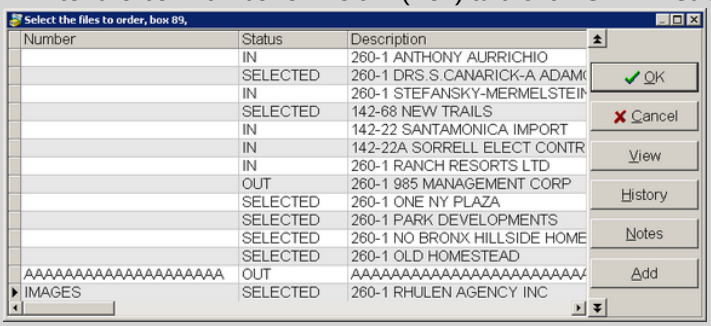


1. Enter the desired information in the appropriate fields (one must enter at least the department and the type of the file) and press **OK**. The file is added to the order as an auto-inventoried file[866]. You are returned to the list of files, with the added file selected.
2. Click **OK** to add the file to the order.

By box:

- Enter the box number or Field 1 (Box) and click **OK**. A list of files in that box appears.



- If the file exists, highlight the file and click **OK**.
- If the file has not been inventoried but the customer wishes for you to search in the box, click the **Add** button to create an auto-inventoried file[866]. In the window that appears, enter the file number, description, and/or field 1, then click **OK**.
- You are returned to the list of files in the box, with the new file selected. Click **OK** to add the file to the order.

Note: Because several files can have the same number and description, click on the View button to open the detailed report and see the RC number, in order to be sure that the right file is ordered.

Note: Auto inventoried files in boxes can only be added to an order if the box has been specified.

Adding a quantity of return items

1. Click on **Item->Add Item->Returns->Not Specified**. A window appears.

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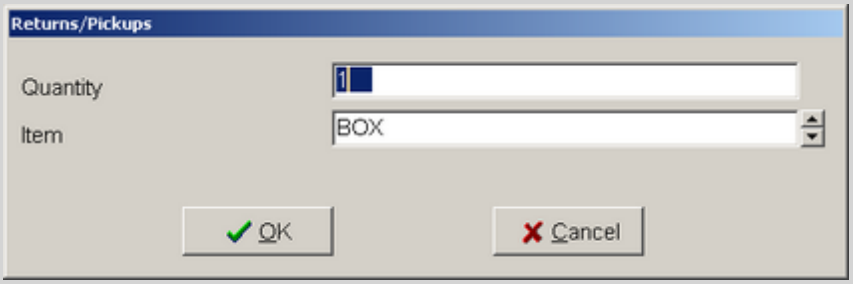


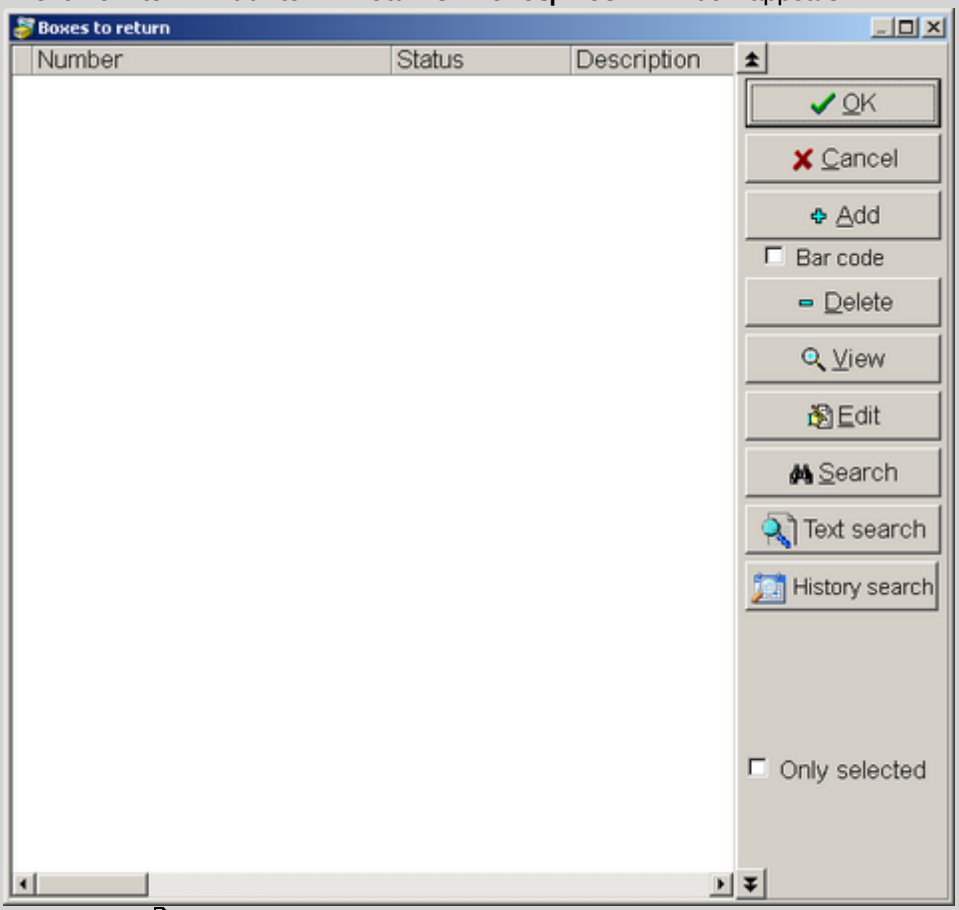
2. Enter the quantity of return items, select whether the items are Boxes, Files, or Tapes, and press **OK**.

Note : This quantity of returning items appears on the delivery slip for reference in planning and performing the delivery. For return courier, the actual quantity billed is taken from the quantity entered or scanned on the return delivery.

*Adding a return of specific boxes or files

This option need only be used if a customer wants to ensure that specific items are picked up. It is easier to use non-specified returns.

1. Click on **Item->Add Item->Returns->Boxes|Files**. A window appears.



2. Build a list[492] of items to return using the may options available.
3. Press **OK** to complete the operation.

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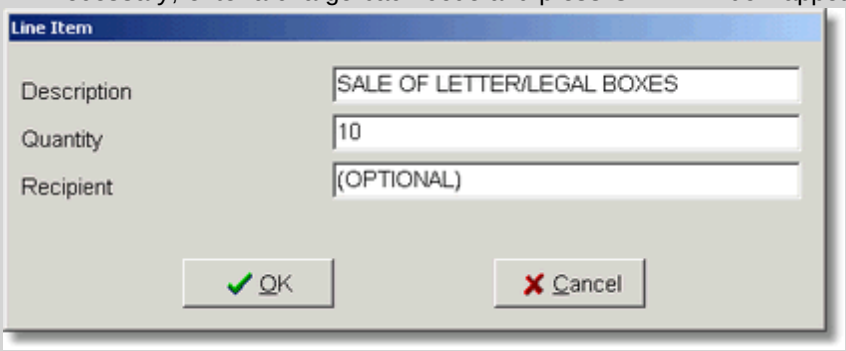
Note : Specified returns are listed on the delivery slip. If the delivery is performed with the PDT, the PDT will prompt the driver for each item to be picked up. (It is not necessary to scan boxes in the order prompted.) If items were not picked up, a report will of missing items will appear upon returning the delivery. It is still possible to mark the return as complete, but missing items will be added to the process errors report[681]. (see Reconciling process errors[673]).

Adding a cardboard box sale

1. Click on **Item->Add Item->Box Sale**. When the customer is billed by charge back a window appears.
2. If necessary, enter a charge back code and press **OK**. A window appears.

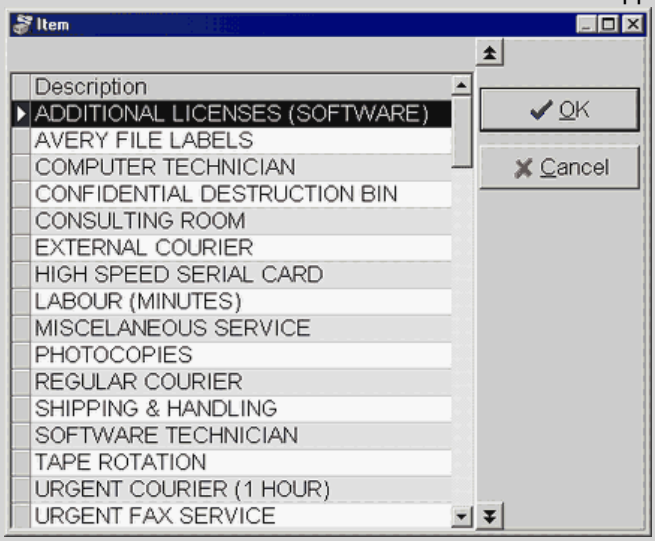


Note : The system displays by default the quantity entered in the Order Minimum field of the General Pricing module for the box sale items. No quantity of box sale less than this one can be ordered.

Adding products or services to an order as Line items

A record center can make any product or service available for order as a line item[739], which might or might not be billed. Common examples include bar code labels, non-standard size boxes, and various service charges. To be included on that list, the Line Item and Order Entry fields of the item in question must be set to "Yes" in the General Pricing module.

1. Click on **Item->Add Item->Line Item**. A list of line items appears.



2. Highlight an item and press **OK**.
3. Depending on the customer billing options, you may be prompted to select a department or charge back code. If so, elect the appropriate one and press **OK**. A window appears.

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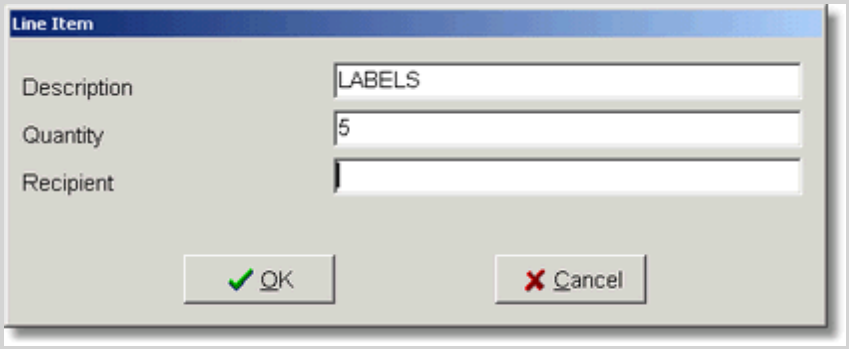


4. Enter the desired quantity, and optionally the recipient, and press **OK**.

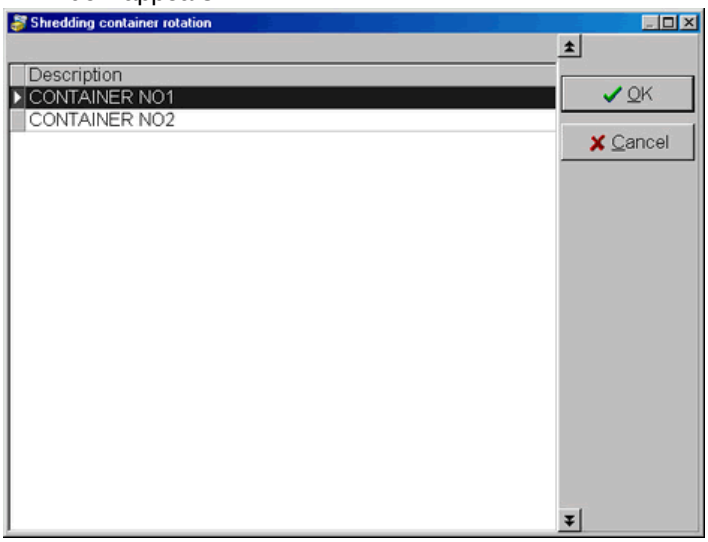
Adding shredding-related services to an order

Four shredding-related order options exist.

Operation	Containers	
	To customer	From customer
Shredding container rotation	1	1
Shredding container delivery	1	0
Shredding container return	0	1
Shredding container emptying	0	0

To add one of these services to an order:

1. Click on **Item->Add Item->Shredding container/bag rotation | delivery | pick up | emptying.** A window appears.



2. Highlight the type of container to be processed, then press **OK**.
3. The item will be added to the order.

Note: The container type must be made available to the customer[130] before it can be ordered. Shredding container delivery and return order items can be placed through EDC RC but not over the web, since they are typically associated with contract modifications.

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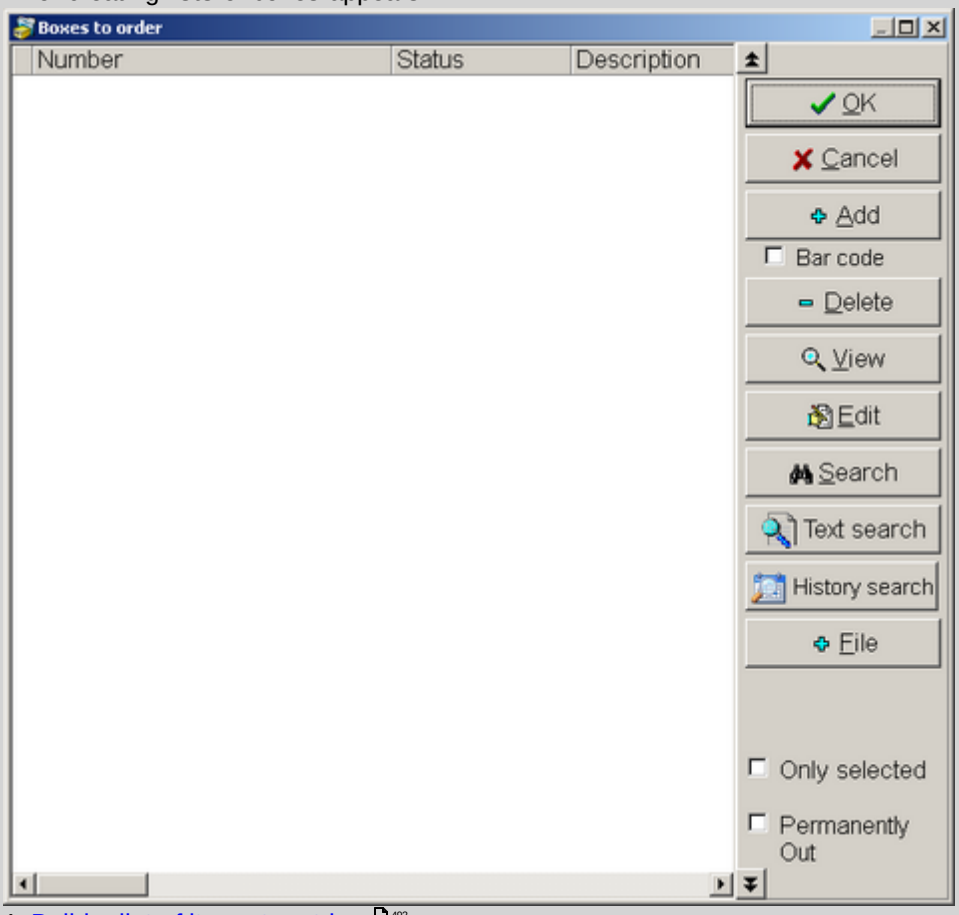
Adding a box from a search

You may also create a list of boxes to order using box and file searches through the orders module.

1. From the menu, select **Item->Add Item->Box Search**. A window prompts for a recipient.
2. Enter the recipient and press **OK**.
3. If a window prompts for a charge back code, enter the charge back code and press **OK**. A window for creating lists of boxes appears.



4. Build a list of items to retrieve[492].

Note : By selecting a box in the ones that are added to the order and by clicking on the **File** button, it is possible to enter a description for a file contained in that box; this will indicate to the system not to order the entire box but only the file.

- To include only certain boxes from the list: select the boxes and files you want to add and check the field called **"Only Selected"**.
- If the boxes are to be permanently removed from storage, check the field called **"Permanently Out"**.

5. Click on the **Accept** button to confirm the addition of all the items to the order.

The available boxes and files are added to the order and a message appears for each rejected item, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.).

*Adding a file from a search

You may also create a list of files to order using file searches through the orders module.

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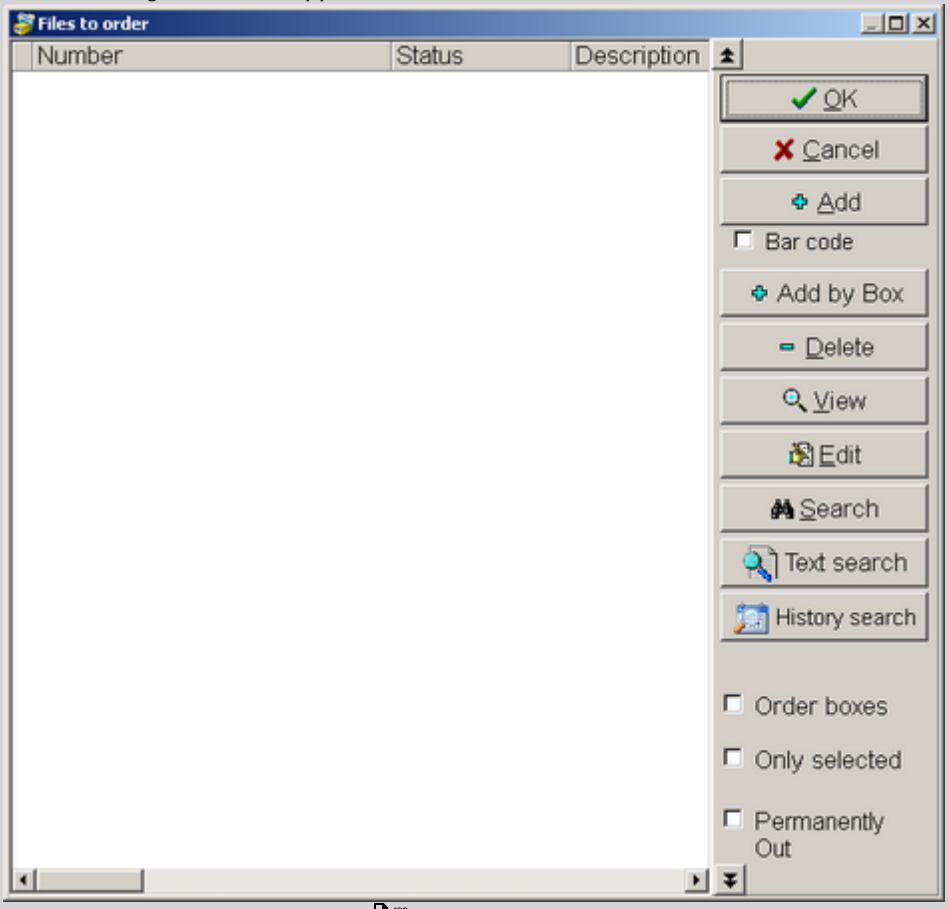
1. From the menu, select **Item->Add Item->Box Search**. A window prompts for a recipient.
2. Enter the recipient and press **OK**.
3. If a window prompts for a charge back code, enter the charge back code and press **OK**. A window for creating lists of file appears.



4. Build a list of items to retrieve[492].

- If your customer wishes to order the boxes containing the files rather than the files themselves, check the **"Order boxes"** field.
- To include only certain files from the list: select the files you want to add and check the field called **"Only Selected"**.
- If the files are to be permanently removed from storage, check the field called **"Permanently Out"**.

5. Click on the **Accept** button to confirm the addition of all the items to the order.

The available boxes and files are added to the order and a message appears for any rejected items, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.)

Adding an item (or return item) by text file importation

It is possible to add items to an order from a text file. This file must include one of the following types of information, with one item per line.

- Box number
- Box RC number

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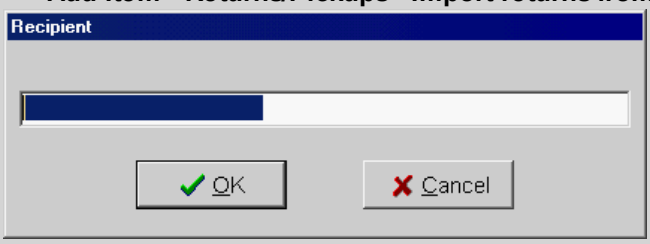
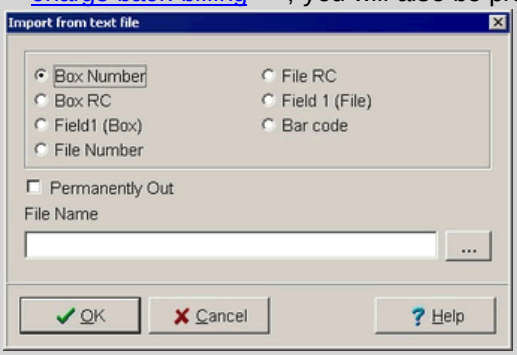
- Box Field 1
- File number
- File RC number
- File Field 1
- Bar code

1. To add items click on **Item->Add Item->Import from text file**. (To add return times, Click **Item->Add Item->Returns/Pickups->Import returns from text file**.) A window appears.



2. For outgoing items you will be prompted to enter a recipient and press **OK.** (If the customer uses charge back billing[250], you will also be prompted for a Charge Back code.) A window appears.

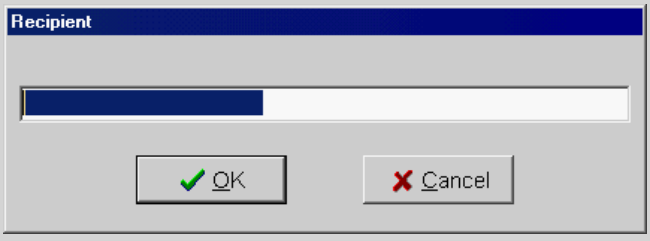


3. In the top area, indicate the type of data contained in the file.
4. Click the **"..."** button and browse to the text file, then click **OK**.

Adding an item by list

This option allows you to add a list of items that are specified using the same type of information (such as item bar code, box number, or file RC number). You may copy-and-paste in items using your operating system's clipboard, type the values in directly, or even scan bar codes in with a USB or wedge bar code scanner attached to the computer.

1. From the menu, select **Item->Add Item->Add to Order from List**. A window appears.



2. Enter a recipient and press **OK**. (If the customer uses charge back billing[250], you will also be prompted for a Charge Back code.)
3. A window appears.

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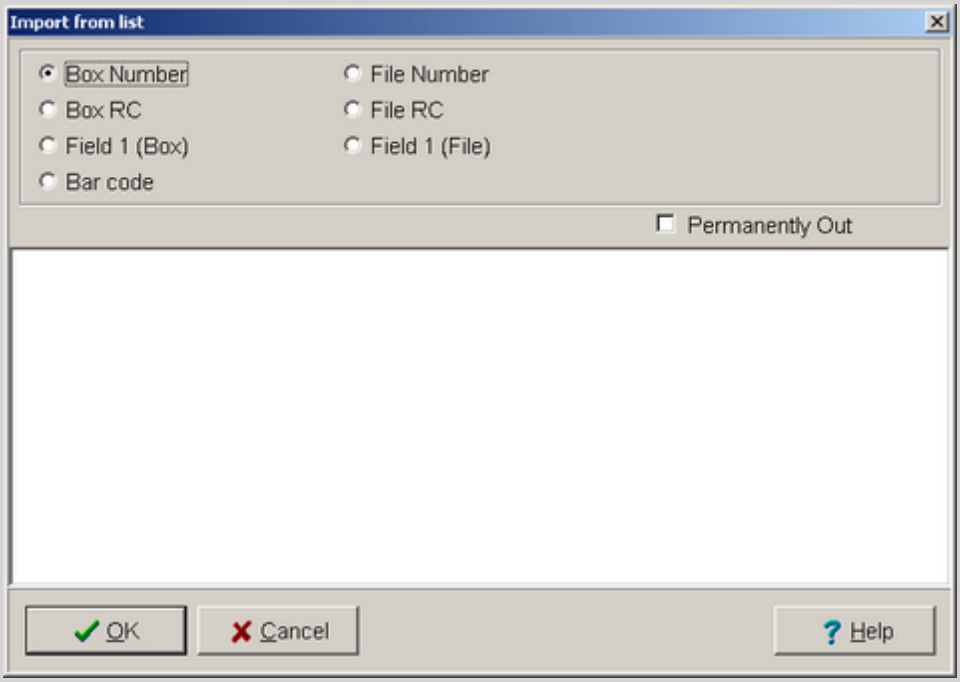

4. In the top area, indicate the type of data in the list.
5. In the bottom area, paste in the list, one record per line.
6. If the items are permanently out, select the **Permanently Out** check-box.
7. Click the **OK** button.

Items that are accepted will be added to the order. If any items are rejected, an error message will be displayed explaining why.

Adding items of an item set

In Box and File records, there is a text field called Item Set[448]. Entering the same value for multiple records for the same customer will cause them to be part of the same item set.

If several items are assigned to the same Item Set[448], (e.g.. "Friday Tapes"), ordering any item in the set will cause all items to be placed on the order. (EDC will notify you if any of the items are not available.)

If any of the items are not required, remove them from the order manually.

Related topics:

Placing an order in EDC RC[147]
Introduction to the Order module[146]

8.3.4.4 Adding items to a shredding order

For details on creating an order, see Placing an order in EDC RC[147]. If the delivery type that you select during this process is an on-site delivery type, you will be prompted to estimate the shredding time and weight for the order and then schedule it using the calendar. You will notice that the items that you can add to the order are limited to services that make sense for the delivery type that you have selected.

1. Create an order in EDCRC[147], selecting an on-site delivery type for the service. A dialogue appears.

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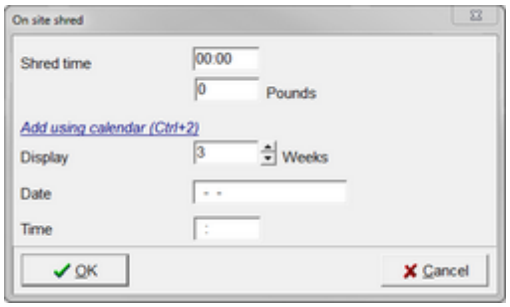
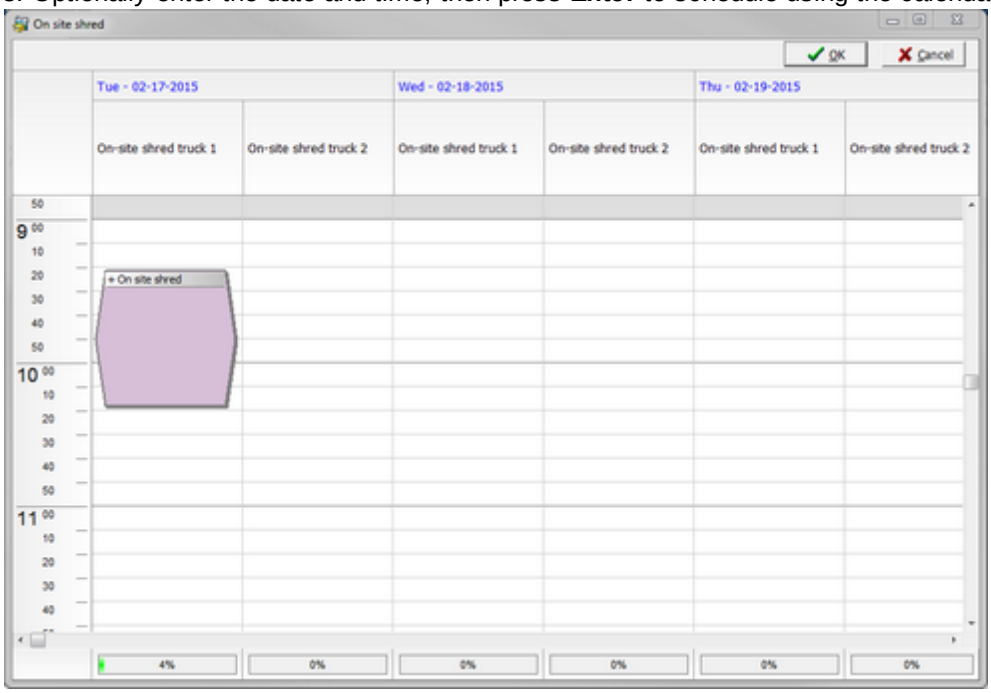
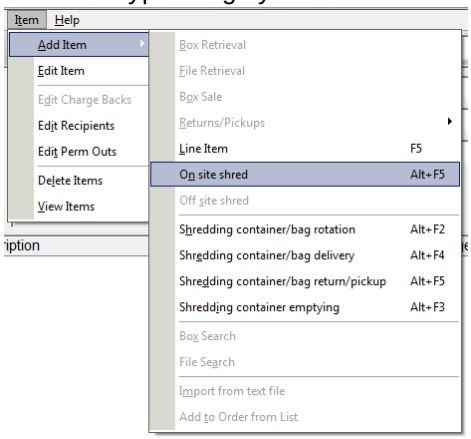


2. Estimate the shredding time (in hours and minutes) and the pounds.
3. Optionally enter the date and time, then press **Enter** to schedule using the calendar.



4. Considering the weight capacity of the vehicle displayed at the bottom and the scheduling slots available, click on the slot in the calendar for the vehicle and time-slot that you wish to use for your order, then click **OK**.
5. From the menu, select from the available options. Notice that items that do not make sense for this service type are greyed out.



The options are:

- Line items, which might be supplies or charges

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- On site items, which are defined in general pricing*** and can be adjusted through rcMobile based on actual service.
- Shredding container services including rotation and emptying service, and delivery and pick-up of containers - for adjusting the number of containers that the client has at the address.

6. After you are done adding items, press **Ctrl-Enter** or the green check mark to accept the order.

Notes:
- When it is accepted, the order is automatically assigned a delivery number and takes the "grouped" status.
- It is possible to edit the schedule, delivery address, and special instructions, but it is not possible to edit the items on the order through the order module. Drivers can however adjust this on site through rcMobile.

8.3.4.5 Establishing a recurring order

The recurring order module is used for scheduling orders for shredding rotations and line-items.

The order parameters and scheduling patterns are established in the recurring orders module. Then, on a daily basis around 9:00 AM, the system consults this list of rules and creates those orders due to be delivered for the subsequent delivery date.

*** It is now possible to create recurring orders up to two weeks in advance, via the shredding calendar.

Warning: Orders deliverable within the next two days should be entered directly as orders in the **Orders->Order** module. This is because orders for a specific delivery cycle are created from recurring orders near the 9 AM cut off prior to when regular orders for the delivery cycle in question are being picked. If you miss this scheduled process for the delivery cycle in question, then the orders would not automatically get created.

In setting up the recurring order, it is necessary to specify the user, delivery type, and delivery address to use. If the profile of a user is made inactive or modified such that it can no longer be used to create the order, an error will occur and the order will not be created. Therefore, it is good practice to set up a special authorized user for recurring orders.

To set up a set up or change a shredding rotation service:

The instructions below are for setting up recurring service. If you are adjusting the quantity of bins at a customer site by adding one without retrieving one of the same type or conversely retrieving a bin without replacing it, then you will want to place an individual for this non-recurring service adjustment, using the standard order entry process. Please see Placing an order in EDC RC 147. If a recurring order is scheduled for the same date and the delivery types are compatible, then the orders will group together onto the same delivery when delivery creation occurs.

To establish a recurring order:

1. Open the **Orders->Recurring Orders** module.

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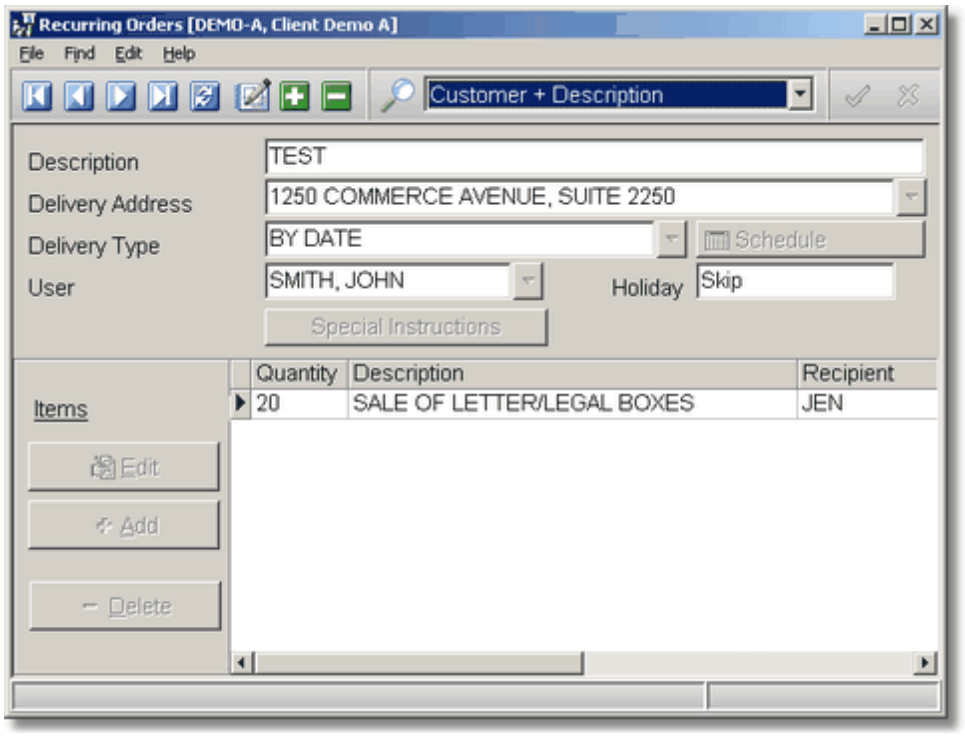

2. Click on **Edit->Add**. A dialogue box prompts for a customer.
3. Enter the customer key and press **OK**. A blank recurring order appears in edit mode.
4. In the **Description** field, describe the order. This is for reference purposes.
5. Press the **Tab** key to take you to the **Delivery Address** field, and press the **down** key or click the drop down box to select the delivery address from the list of addresses available to this customer.
6. Press **Tab** and **Down** again to take you to the Delivery Type field and select a **delivery type**. Note that the customer must have a by date delivery type available.
7. Press **Tab** and **Down** again to take you to the **User** field and select an authorized user.
8. If there are special instruction that you wish to have appear at the bottom of the delivery slip, Click on the **Special Instructions** button add them and click **OK** when done.
9. In the **Holidays** field, specify whether to Deliver after, Deliver before, or Skip a deliveries that would fall on holidays. (Warning: The option to Skip should be used with great caution.)

Add items

10. Add items to the order by pressing on the **Add** button.
11. Select the type of item to add. Options include:

- **Returns/Pickups** (a place-holder to indicate that your driver should pick up boxes or files for records management.)
- **Line Item** (may be a physical non-inventoried item to provide such as supplies, a service, or a charge to apply).
- **Shredding container / bag rotation** - Service a bin or console at the customer site, scanning the item's bar code and putting an empty one in place of the full one that is retrieved from the client. For adjusting the quantity or types of bins at a client site for emptying or rotation service, see here ***
- **Shredding container emptying -** Service a bin or console at the customer site by scanning the bar code, emptying it and leaving it in place.
- **On site shred** (a configurable shredding service for non-bar coded items. Your driver can adjust the quantities on site to reflect actual service using rcMobile***. This can only be provided using an on site shred truck and is typically more expensive than the off site equivalent, which you may also offer.)
- **Off site shred** (a configurable shredding service for non-bar codes items. Your driver can adjust the

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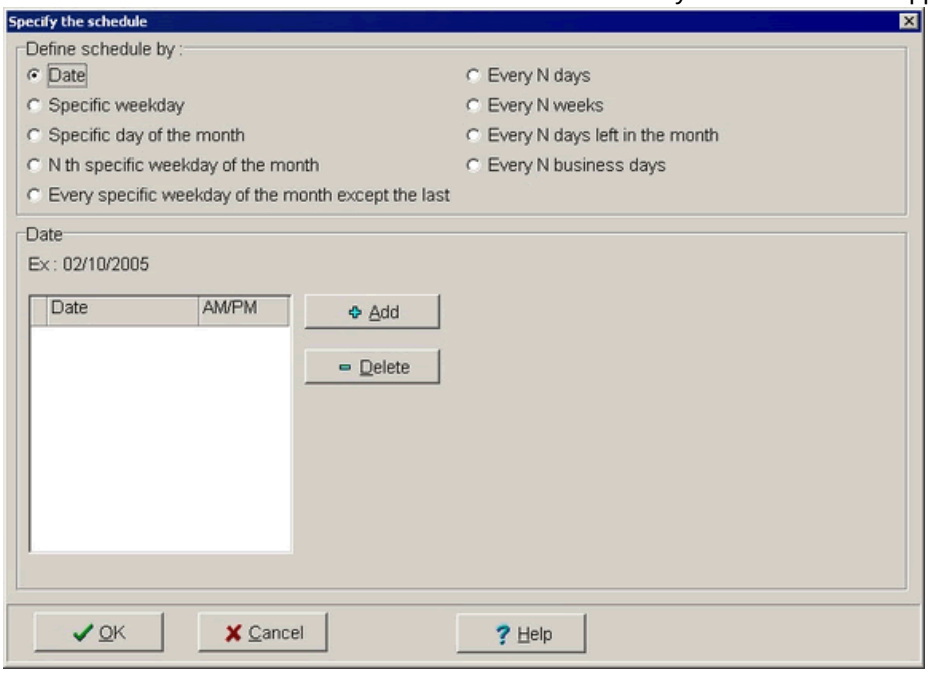
quantities on site using rcMobile to reflect actual service.)

12. Select the item from the list of options for items of that type.
13. If prompted, select the department and sub-department for billing purposes
14. Enter the quantity and (optionally for line items) a recipient and press **OK**.
15. When all the items have been added to the list, press the **Accept** button.

Establish the Schedule

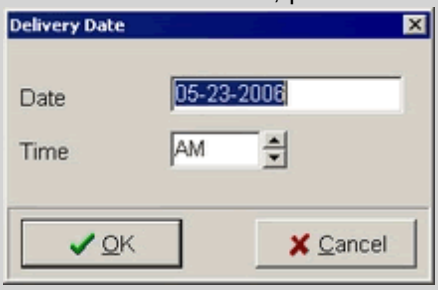
16. Press on the **Schedule** button to set the order's delivery dates. A window appears.



Select the way you want to define the schedule in the list of options. For each option a different set up is shown :

When Date is selected :

To add a date in the list, press on the **Add** button. A window appears



- Enter a date and select a time of delivery (AM or PM) and press **OK**.

- To delete a date, select a date in the list (it will appear highlighted) and press on the **Delete** button.

When Specific weekday is selected :

- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.

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- Select a specific Month (it will appear highlighted) or select the All option.

When Specific day of the month is selected :

- Select a Day of the month in the list (1,2,3...).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When N th specific weekday of the month is selected :

- Select a N th week (First, second, third ...) in the choice field.
- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every specific weekday of the month except the last is selected :

- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every N days is selected :

- Select a number of days (N days) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every N weeks is selected :

- Select a number of weeks (N weeks) in the choice field.
- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every N days left in the month is selected :

- Select a number of days left in the month (N Days Left) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

When Every N business days is selected :

- Select a number of business days (N Business Days) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

17. Once the schedule has been established, press **Ctrl-Enter** or click the green check mark to accept.

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Related topics

Overview (Recurring Orders)[681]
Fields (Recurring Orders)[682]

8.3.4.6 Establishing a rotation schedule

Many record centers offer their customers a service of securely storing their electronic back-up tapes. They drop off the tapes when they are required and pick them up the next day to return them to the vault. These tapes are typically rotated according to a pre-determined schedule.

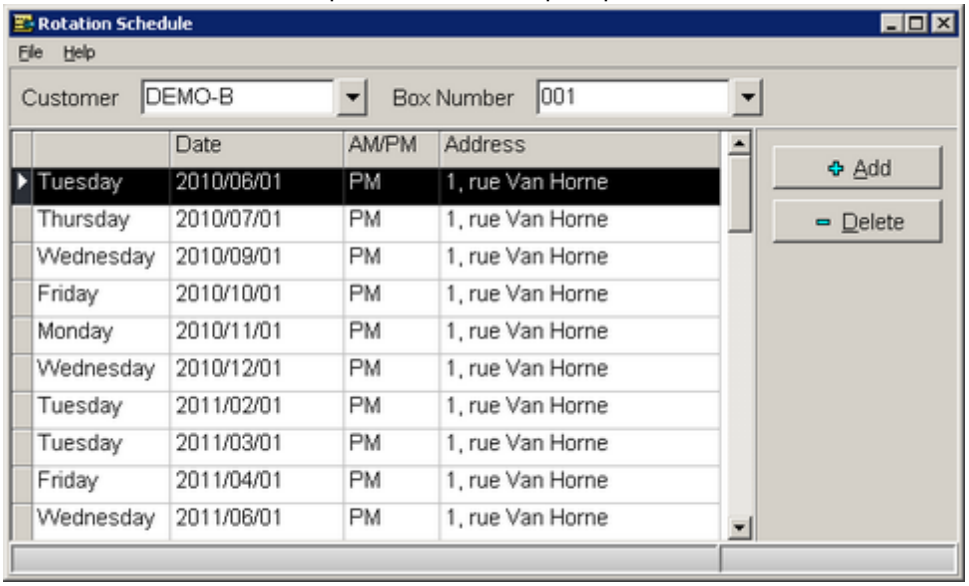
There are several ways in which people manage their tape rotation schedules.

- You can create rotation schedules in EDC RC
- Your customers can create rotation schedules on ActiveWeb (See ActiveWeb documentation)
- Your customers can create rotation schedules in ActiveFile (See ActiveFile documentation)
- Automated tape management systems (TMS) can place the orders using the order processor. (Note that this option does not make use of the rotation schedule module)

To establish a rotation schedule in EDC RC:

- Understand the pattern in the delivery dates. Marking the dates on a calendar can be helpful, especially for more complex patters.
- Decide how long you will schedule rotations for these tapes for. (egg. the next 3 years?) Note that customer and[335] record center holidays[351] should be entered in advance for at least the same period, so that you can be notified if any of your deliveries would fall on a holiday.

1. Open the **Inventory->Rotation Schedule** module.
2. Click the **Customer** drop-down. A window prompts for a customer. Enter a customer key.
3. Click the Box Number drop-down. A window prompts for a box number. Enter a box number.



	Date	AM/PM	Address
Tuesday	2010/06/01	PM	1, rue Van Horne
Thursday	2010/07/01	PM	1, rue Van Horne
Wednesday	2010/09/01	PM	1, rue Van Horne
Friday	2010/10/01	PM	1, rue Van Horne
Monday	2010/11/01	PM	1, rue Van Horne
Wednesday	2010/12/01	PM	1, rue Van Horne
Tuesday	2011/02/01	PM	1, rue Van Horne
Tuesday	2011/03/01	PM	1, rue Van Horne
Friday	2011/04/01	PM	1, rue Van Horne
Wednesday	2011/06/01	PM	1, rue Van Horne

4. The module window is populated with any scheduled deliveries for that tape.

You may add or remove delivery dates using various tools, as follows:

To add an individual delivery date:

- Click the Add button
- In the window that appears, enter the delivery date (and if appropriate, AM or PM delivery cycle).

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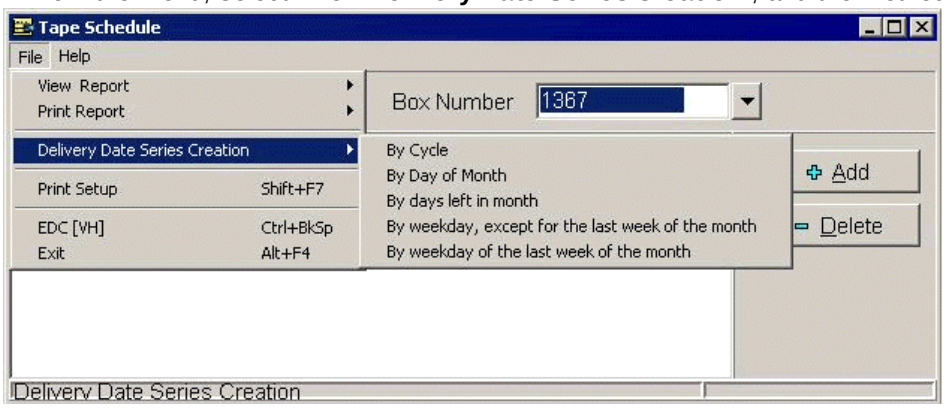
To delete delivery dates:

- Select the delivery dates to delete. (They will be highlighted in black)
- Click the **Delete** button. The dates will be removed.

To add a series of delivery dates:

- From the menu, select **File->Delivery Date Series Creation**., and the method that you wish to use.



- **By cycle:**

1. Choose a start date for the deliveries
2. Choose the number of days you want the cycle to be repeated
3. Choose the end date of the deliveries
4. Select a delivery address in the list (it will appear highlighted) and press **OK**

- **By Day of Month:**

1. Choose a start date for the deliveries
2. Choose the day you want the tapes delivered (ex: for the fifteenth write 15)
3. Choose the end date of the deliveries
4. Select a delivery address and press **OK**

• By days left in month

1 Choose a start date for the deliveries
2 Choose the number of days before the end of the month
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

• By weekday, except for the last week of the month :

1 Choose a start date for the deliveries
2 Choose the weekday you want the tapes delivered
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

• By weekday of the last week of the month:

1 Choose a start date for the deliveries
2 Choose the weekday you want the tapes delivered
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

Example: If you want the tape to return every Friday you would:

1 Go in **Tape schedule->Delivery Date Series Creation -> By Cycle**

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2 Choose a start date (on a Friday)
3 Choose a number of days (7)
4 Choose any end date
5 Select a delivery address and press **OK**

Note: If there are any invalid dates, a report of errors will appear in the window. When this happens one asks the customer whether they would like to add an alternate date (egg. the day before or after), or skip the delivery.

Note:

- Many record centers use ActiveWeb instead of this module to enter rotation schedules on behalf of the customer.
- A customer must have a web license that includes Rotation in order to make use of this function.
- Many record centers use ActiveWeb instead of this module to enter rotation schedules on behalf of the customer.
- The system attempts to create orders for tape rotation when picking is performed during the appropriate picking cycle - i.e. starting one hour after the previous cut-off time, up until the cut-off time for the current cycle.
- Because creation of rotation orders is triggered by the creation of picking lists, it is important to create a picking list 622 every cycle (day or half-day), even if no external orders have been placed.
- The delivery type used for rotations is specified as the scheduled order delivery type 370 in the Management->System Information module.
- If tapes are combined as a single set, the schedule is assigned to the master tape, and the entire group of tapes is assigned to the same **Item Set**.
- It is very important that tape schedules be creates at least one day in advance before the first delivery date, as automatic tape orders are generated one day in advance.

Related topics:

- Changing a delivery address for tape rotation 496
- Viewing or printing tapes returned on a holiday 497
- Viewing or printing the tape schedule of a customer 497

8.3.4.7 Generating a delivery to bill for record center work

Creating an order in EDC RC is the first step in providing a service to a customer. However, you can also create an order for the purpose of adding a charge to the invoice that will be created on the customer's invoice.

If an order is placed without any pickable items or request to return from the customer, then the order will automatically be closed and the corresponding delivery will be created and go directly to the verified state. Any non-pickable line items included on these orders will automatically appear with the other items on the service invoice.

Steps:

Ensure that the price codes to be used are non-pickable line items

(This is only necessary the first time using the price code in this way)

1. Open the **Accounting->General Pricing** module.
2. Navigate to (or add) the price code in question.
3. In the Line Item section of the price code configuration, ensure that Line Item = Yes, Order Entry is selected, and Pickable is not selected. (Charges are typically also marked as Record Center Only, since customers will not order these online.)

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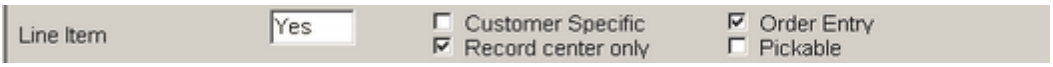


4. If necessary, press **Ctrl-E** to edit, make the changes, and press **Ctrl-Enter** to save when done.

Place an order[147] in the usual way.

- Your record center may create a delivery type[78] for this purpose, with a name such as "Record Center Work". Most delivery types will work though.
- Once the blank order is created, press **F5** or from the menu select **Item->Add Item->Line Item** to add one or more line items from the list.
- Select the desired line item and click **OK**.
- Once all items have been added, press **Ctrl-Enter** to accept the order.

8.3.5 Picking operations

8.3.5.1 Creating a picking list

Once orders have been entered, it is possible to start fulfilling them. The picking list is used to guide you through this process. In the case of line items and shredding containers, the picking list will tell you what is required, for whom, and how many. In the case of boxes and files, the picking list will guide you to the location to retrieve the items, ordered by location.

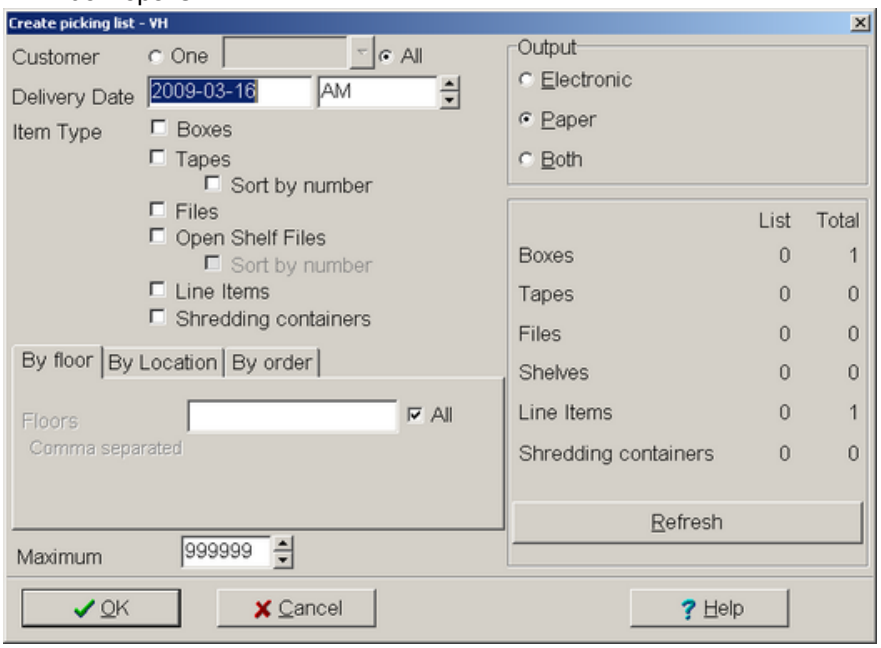
Because picking lists are ordered by location, it is efficient to pick many orders at once, rather than running back and forth.

For every delivery cycle, it is important to do what is known as a **final pick**, once the cut-off time for orders passes and you know that there will be no more items to pick for that cycle.

In practice, if there are not too many items it may be efficient to wait until the cut-off to do all of your picking.

To create a picking list:

1. From the **Orders->Picking List** module, select **File->Create picking list**, or press the **F2** key. A window opens



2. Select the desired options to create a picking list, including the item types and the desired output

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format.

List criteria:
Various options allow you to specify what to include or exclude from the picking list.
- **Customer:** You will usually pick for all customers, but it is possible to limit the list to one if necessary.
- **Delivery date:** This will default to picking for the next delivery cycle, though it is possible to change this to pick by date orders in advance.
- **Item type:** Item types not selected will be excluded from the list. Items are typically sorted by location unless the option to **sort by number** is selected.
- **By floor:** If the "All" box is deselected, you may specify a list of picking levels to pick from. It is also possible to specify a range of locations with **By location**, or a list of orders with **By order**.
- **Maximum (number of items to include per picking list)**: If you want to break picking into multiple lists, specifying the maximum number of items to include is a very practical means of doing this.

Output:
The output section allows you to chose whether to send the picking list in **Electronic** format to the PDT, print it on **paper**, or do **both**. Electronic is standard, but EDC will remember your previous setting.

List / Total:
Total shows the number of each type of item remaining to be picked for the delivery cycle.
List shows the numbers that will be included on the list, based on the item types and picking levels selected. (Click the **Refresh** button to update this display after changing options.)

3. Press the **Okay** button. If a paper or both output options were selected, the picking list will print.

4. If Electronic or Both output options were selected, you will be prompted to prepare the prepare the PDT for download. Place the PDT in the cradle or connect it to the cable, then press **2** from the main menu to receive. Then click **Okay** on the computer to start the transfer.

- Picking labels will be printed automatically for PRE-ADD or ALL files, depending on the Print Picking Labels setting in the System Information module[365].
- File out card and open-shelf out card labels and box picking labels may be printed according to options in the Customer Information module[248].

8.3.5.2 Processing rush orders using pick and run

Rush orders are orders that are not grouped with other orders and must be processed immediately rather than observing regular delivery cycles. (These are orders that have ship modes of By time or 24 Hours. They are picked separately using a process called **Pick and Run**.

When a rush order is entered, notification e-mails are sent to the addresses specified in pager options[358]. These e-mails include the order number.

To pick an order using Pick and Run:
1. Open the **Orders->Order module**.
2. Navigate to the order specified by the notification e-mail. (This will frequently be the one that the module opens to).
3. From the menu, select **File->Pick and Run**. A message appears "Prepare the portable terminal for the data transfer".

From here on, the processing of rush orders is similar to any order or delivery, except that:
- If the picking list is not downloaded to the PDT within the time limit specified in pager options[358], the

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first warning will be sent.
- When picking results are uploaded back to the computer, the delivery slip will be immediately printed. Items not picked are assumed to be excluded.
- If the picking list (result) is uploaded back to the computer within the time limit specified in pager options[358], the second warning will be sent.
- If an item is skipped on the PDT, it is excluded from the delivery.

Note that:
- Rush deliveries may be included on delivery routes
- Other options apply, such as truck validation and delivery with PDT

8.3.5.3 Picking items with the PDT

Once one or more picking lists have been downloaded to the PDT, you may pick them as follows:

On the PDT:

1. If necessary, turn on the power on the PDT, and if prompted to login, scan your employee bar code.
2. From the main menu, select **3-Processing->1-Picking** (by pressing **3**, then **1**). the list of picking lists on the PDT is displayed, including the number and type of items, and the picking levels to find them on.
3. Press the number corresponding to the list you wish to pick. The first item of the list is displayed.
4. Process the items on the list as described below

As each items is found or skipped, you will be advanced to the next item. Once the last item is found, you will be returned either to the main menu or to the first skipped item (in which case, Press **0** and **Enter** to quit).

Picking items:

- **Boxes (or tapes):** Go to the location on the PDT, then pull and scan the box. Note that scanning boxes out of order is permitted.
- **Files from boxes:** Go to the location and pull the box indicated on the PDT (or the picking label - which is often easier). Once you have found the file, prepare and insert the out card, then pull and label the file with the "On File" bar code. Scan the file, box, and location. (Note that for file pulls, EDC expects boxes to be returned to the same location). **Note:** When the item on the PDT is a file, the **8** key may be pressed to display additional information about the file.
- **Files from open shelves:** Prepare and insert the out card, then pull, label, and scan the file.
- **Other items:** To pick line items, press **4 (Pck)** on the PDT.
- Items not found: If an item is not found, skip it and exclude it manually; press **2 (Nx)** and **ENTER**., Then press **2 (Nx)** again.

Note : When an item is picked properly, the PDT automatically displays the next item. If there is an error, the PDT gives a warning sound and does not display the next item. Press the **Clr** button on the PDT, then verify that you have scanned the correct label.

Once you are done picking:

Upload picking results to the computer:

5. On the computer, open the **Orders->Picking** module.
6. From the menu, select **File->Upload Pick Results**.
7. Place the PDT in the cradle so that the green light is on and the infrared windows align.
8. On the PDT, select **2-Send results**, **1-Picking**, then the **number** of the list to send.
9. The PDT will indicate Transfer complete, and the computer will warn if any items were not picked.

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Exclude items not found:

If files were not found, one option is to bring the box and the file picking label back to a better lit area for a second person to search. This person will search the box and then either find the file and pick it manually, or confirm that it should be excluded (and call the customer).

To manually exclude (or pick) a file:

10. Open the **Orders->Picking** module
11. From the menu, select **File->Manual Picking**.
12. From the picking label, enter the order number
13. Highlight the item(s) to exclude or pick, and click the exclude or pick button. (You will be prompted for a reason for excluding the item. This will appear on the delivery slip).
14. Click the **Close** button when done.

8.3.6 Shipping operations

8.3.6.1 Creating Deliveries

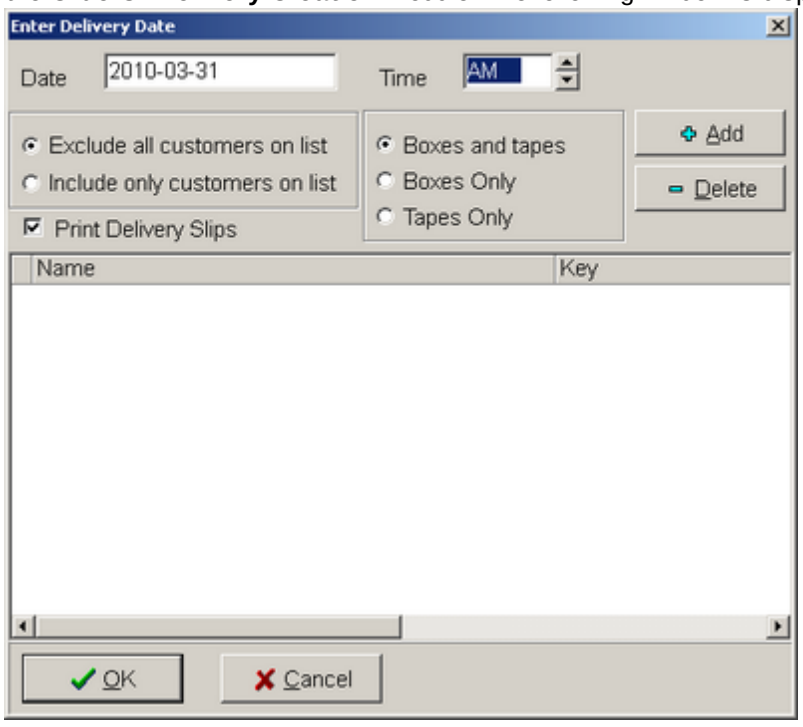
Once the cut-off time for a delivery cycle has passed and the picking has been done, the next step in processing standard orders is to perform delivery creation.

Notes:

- It is possible to perform delivery creation before all picking results are uploaded. However, delivery creation must be repeated once these results are uploaded, in order to close the outstanding deliveries.
- It is necessary to perform delivery creation after the cut-off time. It is also possible to create deliveries earlier, but this may result in multiple deliveries for orders that would otherwise be grouped together.

To perform delivery creation:

1. Open the **Orders->Delivery Creation** module. The following window is displayed:



2. Make any necessary modifications to the default delivery creation parameters:

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- **Date and Time:** These default to the current delivery cycle. It is not necessary to change this during normal operations.
- **Exclude | Include all customers on list:** It is possible to override cut-off times for specific customer accounts, in which case deliveries for these customers would be done at a different time using this option. The lower panel of the window contains an exclusion list[378] specifying customers for whom deliveries are created separately. This is defined in the System Information[364] module, and may be temporarily modified here by clicking on the **Add** or **Delete** buttons to add or remove customers from it. To create deliveries for the rest of the customers, accept the default setting of Exclude all clients on list. To create the non-standard deliveries, select the "Include only clients on list" option.
- **Boxes and Tapes | Boxes only | Tapes only:** This option allows you to create deliveries for tape accounts separately from box accounts. This may be useful if your tape processing operations are separate.
- **Print Delivery Slip:** If you are using delivery routes for these deliveries, you may deselect this box and print the delivery slips for record center deliveries through the **Orders->Delivery Route**[639] module. (Slips for deliveries that cannot be included on delivery routes will be printed on delivery creation even if this option is not selected.) This has the advantage of issuing the delivery slips pre-sorted by route and stop order.

3. Press **OK**. The system will create deliveries according to all the parameters previously selected.
4. Retrieve any delivery slips that print out. These will be for deliveries for External courier or client pick-up, Fax delivery, or Imaging delivery. Process these accordingly.
5. Process deliveries for record center delivery using delivery routes[172].

Notes:
- If orders for a delivery were not completely picked, that delivery will go to the Created state instead of directly to the Closed state.
- If all items for the delivery were excluded during picking and there are no returns or line items, the delivery will become verified, and no trip charge or fuel surcharge will be applied.
- Delivery slips may also be reprinted[630] through the delivery module

8.3.6.2 Working with delivery routes

Once deliveries have been created[171], the next steps for deliveries that have a "Record Center" ship mode are to:
- Organized deliveries into routes, based on route templates,
- Print the delivery slips and a summary report for the route,
- Validate that items are correctly grouped to deliveries for the truck,
- Download the deliveries for the route to the PDT for delivery with PDT.

To process delivery routes:

1. Open the **Orders->Delivery Route** module. The module window appears, opening to a previously created route.

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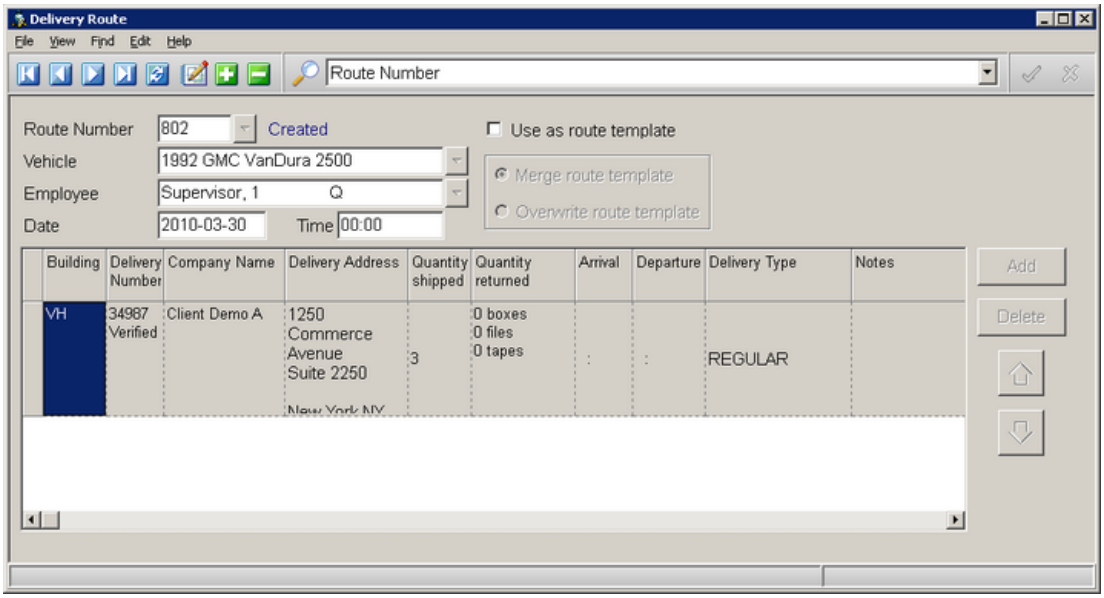
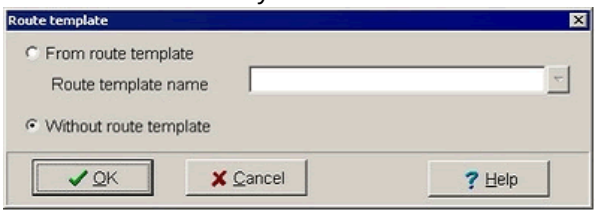


2. Press the **Insert** key or click the "**+**" button to add a new route.



3. Typically, you will use a route template. Select "**From route template**", and click the drop down to select a template. (For instructions on adding a new template, see Managing route templates[674])
4. Click the **OK** button. Any available deliveries to addresses on the template will be added to the route, in the order in which they appear on the template.
5. Specify the **Employee** and **Vehicle** for the route. Change the **date** if necessary.
6. If any deliveries are not to be included on the route this time, highlight the delivery and click the **"Delete"** button.
7. Re-order the deliveries by selecting the delivery and using the **up** and **down** arrows.
8. *Click the **"Add"** button to add any additional deliveries. (Note that if you have multiple routes, it may be easier to create the other routes first, to reduce the list of available deliveries.)
9. Press **Ctrl-Enter** to save the route.

To modify a route template (optional):

1. Navigate to a delivery route that you wish to use modify the template.
2. Press **Ctrl-E** to enter edit mode.
3. Check the **Use as route template** box.
4. select "**Merge route template**" to keep the delivery addresses that are already on the template.
5. Press **Ctrl-Enter** to save.
6. If a list of templates appears, select the template to modify and click the **OK** button.

For each route that you have created:

1. Navigate to the route
2. From the menu, select **File->Print Report->Current Route** to print the route summary.
3. From the menu, select **File->Print delivery slips of route** to print the delivery slips in order.
4. *Download the validation list to the PDT[174], and provide the driver with the paperwork and PDT to perform truck validation of their deliveries[174].
5. *Once validation is complete,upload results back to the computer[174], and download deliveries to PDT

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174 for delivery with PDT.

8.3.6.3 Validating items for delivery (Truck Validation)

For efficiency, picking is done in batches that may include items from many orders for many customers. These items are collected in your shipping area.

Sorting picked items onto deliveries:
Boxes and files include the customer key. It is possible to move items between accounts. Therefore, you cannot always rely on the customer key on the label. However, this can provide a useful initial sorting tool.

- (Optional) Pre-sort items by customer key.

Download truck validation lists to PDT:

1. Open the **Orders->Delivery Route** module to the correct record (or **Delivery** module, if processing an individual delivery).
2. From the menu, select **File->Truck validation->Download list to PDT**. A window prompts you to prepare the PDT.
3. Place the PDT in the cradle, ensuring that the green light on the base is on and the infrared windows align.
4. On the PDT, from the main menu press **1** to receive and **6** for truck validation. The screen reads "Waiting"
5. On the computer, click **Ok** to begin transmission.
6. Once done, press **Clr** on the PDT to return to the main menu

Perform truck validation:

- Retrieve your route summary, delivery slips, and PDT with downloaded validation list.

1. On the PDT, from the main menu press **3** for processing and **6** for truck validation

For each delivery

2. Use the delivery slip to ensure that you have all necessary line items and shredding containers.
3. Locate and retrieve the boxes and files for the delivery
4. With the PDT, scan the delivery slip bar code.
5. Scan each box and file on the delivery.
6. Once the last item has been scanned, the PDT will prompt "Quantity shipped". Type the number of containers shipped and press Enter in the **PDT**.
7. Proceed to the next delivery.

Note: If an item that is not on the delivery is scanned during validation, the PDT will beep unhappily, and the screen will indicate "Item not on list". Remove the incorrect item and press the **Clr** button on the PDT to continue.

Send truck validation results to EDC

8. On the computer, open the **Orders->Delivery Route** module.
9. From the menu, select **File->Truck Validation->Upload list from PDT**.
10. On the PDT from the main menu press **2**- Send results, **6**- Truck Validation, **1**- All.

New delivery slips may be printed with the quantity of containers shipped.

Notice at this point that the delivery has the On Truck status when displayed in the delivery module. The history of a delivery can be viewed from the File -> View History menu operation in the delivery module.

For the customers that use this option, the next step will be to download deliveries to PDT.

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8.3.7 Delivery operations

8.3.7.1 Delivering items with the PDT

Delivery with PDT is optional by account. With this feature turned on for a customer, items to be delivered are downloaded to the PDT before leaving the record center. This permits the driver to scan the items at the customer site and ensure that the correct items are being delivered. It also makes it easy to confirm that the correct items are being picked up at the customer site, if the customer provided this information in placing the order.

This feature is not universally used, as it requires that the drivers have PDTs with them, and it also requires extra time.

Delivery with PDT enables you to print a simple receipt for items picked up at the customer site if you have the correct portable receipt printer. However, the "E-mail return slip" feature may be used to provide customers with a similar confirmation of which items were picked.

To download deliveries to the PDT:

1. Open the **Orders->Delivery Route** module (or **Delivery** module), and navigate to the correct record.
2. From the menu, select **File->Download deliveries | list to PDT**. You will be prompted to prepare the PDT.
3. Prepare the PDT to receive by placing it in the cradle and pressing **1**- Receive, **4**- Delivery/Return.
4. Once the PDT is waiting, press **Enter** or click **Okay** on the computer to transmit the list.
5. When done, press **Clr** on the PDT to return to the main menu.

To perform the delivery and return:

1. On the PDT from the main menu, press **3**-Processing, **4**-Delivery/Ret.
2. **Scan** the bar code on the delivery slip. If items have been downloaded, the PDT will display "Delivery", the delivery number, and "Scan"
3. **Scan** the bar coded **items** to be delivered.

Once the last item to be delivered is scanned, (or if there are no outgoing items for that delivery on the PDT), the PDT will prompt "**Location**", indicating that it is entering the return portion of the delivery.

4. **Scan** your **truck location** bar code or press **0** and **Enter** to skip. The PDT will display "Return", the delivery number, and will prompt for what type of item to process on the return
5. Select the type of item to return by pressing the corresponding number (see below). Once there are no more types of items to return, press **0** to quit.

- Press **1** for Box, then scan any pre-add or returning boxes
- Press **2** for File, then scan any pre-add or returning files that are not in boxes
- Press **3** for Container rotations (when something empty is used to replace something full), scan the container bar code, then enter the fraction full. (See the next section 176 for more details on shredding).
- Press **4** for container emptying (when no new container or liner is left behind)
- When done scanning each type of item, press **0** and **Enter** to return to the previous menu.

(Note that are not bar coded and do not exist in pre-add must be added to the return through the return delivery module. In general, many record centers strongly encourage customers to not send unlabeled items for storage.)

6. The PDT prompts for the quantity of receipts to print on the portable printer (0,1,2,3), enter the desired **quantity** and press **Enter**.
7. Repeat for each delivery. Press **0** and **Enter** to return to the main menu after the last delivery.

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As soon as possible,

Upload deliveries to EDC as follows:

1. Open the **Orders->Return Delivery** module.
2. From the menu, select **File->Upload return delivery list from PDT**. The computer will indicate that it is waiting.
3. Place the PDT in the cradle, and from the main menu press **2**-Send results, **4**-Delivery/Ret, **1**-All and **Enter**.
4. Click on File -> Upload list from PDT
5. An information message appears: "Is the return complete ?". Press Yes or Cancel to close the return and No to return other items.
6. If you have pressed Yes or Cancel, the window for the manual return appears (see Returning a delivery 647)

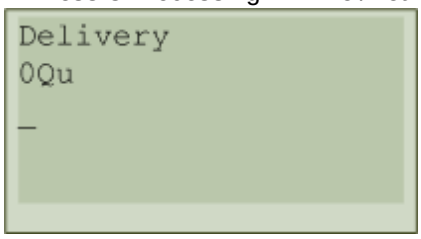
8.3.7.2 Rotating or emptying a shredding container with the PDT

Orders for shredding services are frequently scheduled through the reoccurring orders 681 module. Orders may also be placed individually as required by the customer. Once the record center and customer have been set up for shredding service 130 and an order has been generated, the steps for fulfilling these orders are as follow:

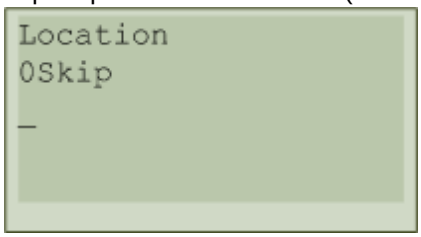
At the customer site:

At the customer site, with the PDT, the driver will:

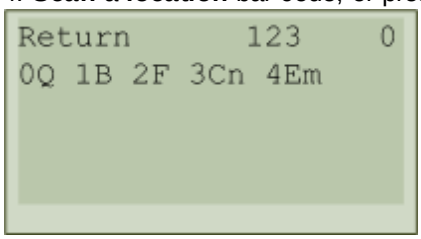
1. Press **3** Processing -> **4** Del/Ret.



2. **Scan** the **delivery bar code**
3. If items were uploaded for delivery with PDT, perform the delivery by **scanning all delivery items** until prompted to Scan location (for the return), or press 0Skip.



4. **Scan** a **location** bar code, or press **0** and **Enter**. You will be brought to the Return Screen



Return (Delivery Number) (Number of items)
0Q 1B 2F 3Cn 4Em

Note: 0=Quit 1=Box 2=File 3=Container Rotation 4=Empty container

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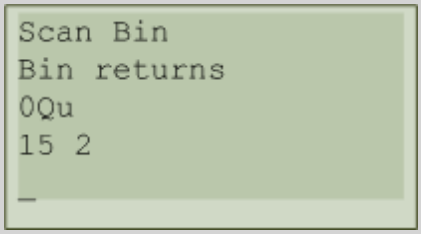
- A rotation is when the driver delivers an empty bin/console bag and physically replaces another bin/ console bag at the client. With consoles, the terminology can be confusing, because from the client's perspective, "emptying a console", is really rotating the bag that is in the console. So this is a rotation operation in EDC, if the bag is exchanged.

- Emptying is when the driver does not exchange any items. The bins/console bags are emptied and kept at the client site.

• To rotate a container:

1. From the Return menu on the PDT, press **3**.

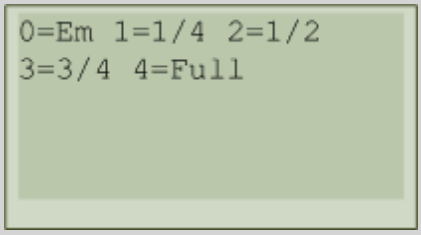
The PDT screen will show the following information :



Scan Bin
Bin returns
0Q
(Bar code of scanned item, if any)

2. **Scan** the **container bar code**

The PDT screen will show the following information :



0=Em 1=1/4 2=1/2
3=3/4 4= Full

3. **Press** the number corresponding to how full the container is (ex: 1 for a quarter full container).
4. Repeat, or press **0** and **Enter** after scanning the last container to return when done, bringing you back to the Return menu.

• To empty a container:

1. Press **4** from the Return menu on the PDT
The PDT screen will show the following information :

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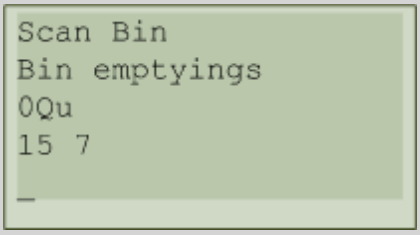

Scan Bin
Bin emptyings
0Q
(Bar code of scanned item, if any)

2. **Scan** additional bins, or press **0** and **Enter** after scanning the last container to return when done, bringing you back to the Return menu.

Complete the return delivery:

1. From the Return menu, process any additional boxes or files on the return in the usual way, then press **0** to complete the return
2. If no receipts are required, press **0** to proceed to the next delivery
3. If no deliveries remain, press **0** and **Enter** to return to the main menu
4. Upon returning to the record center, upload your deliveries[654] on a workstation. On the delivery return, for each type of container, the quantity delivered and the quantity returned will be recorded.

8.3.7.3 Performing a fax delivery

Like imaging on demand[178], fax deliveries can be useful when a customer requires information from a file but not the physical file itself. Orders are processed in the same way as any other order. Once the delivery is created, the delivery will not go on a truck. Instead, it will be processed as follows:

1. Open the **Orders->Imaging on demand** module.
2. Select the transit location, then click **OK**.
3. A window prompts you to "Select Delivery". **Scan the delivery slip**, or type the **delivery number** and click **OK**.
4. A window prompts you for "Number of faxes sent, Delivery [# of delivery]". Enter the number of **pages** to bill for, then press **Enter** or click **OK**.
5. The previous window appears. Enter another delivery, or click **Cancel** to exit.
6. The delivery is automatically set to the Returned state. It will become Verified once the file is re-filed[182] in its box or shelf location.

8.3.7.4 Performing an "Imaging on demand" delivery

Imaging on demand orders are processed much as any other order would be. Once the delivery slip has been printed, the delivery is processed as follows:

1. Open the **Orders->Imaging on Demand** module.
2. Select the transit locations for the imaging area if prompted
3. When prompted to Select Delivery, **scan** the delivery slip, or type the delivery number and click **OK**.
4. **Scan** the bar code of the first file to be imaged. The imaging interface appears.

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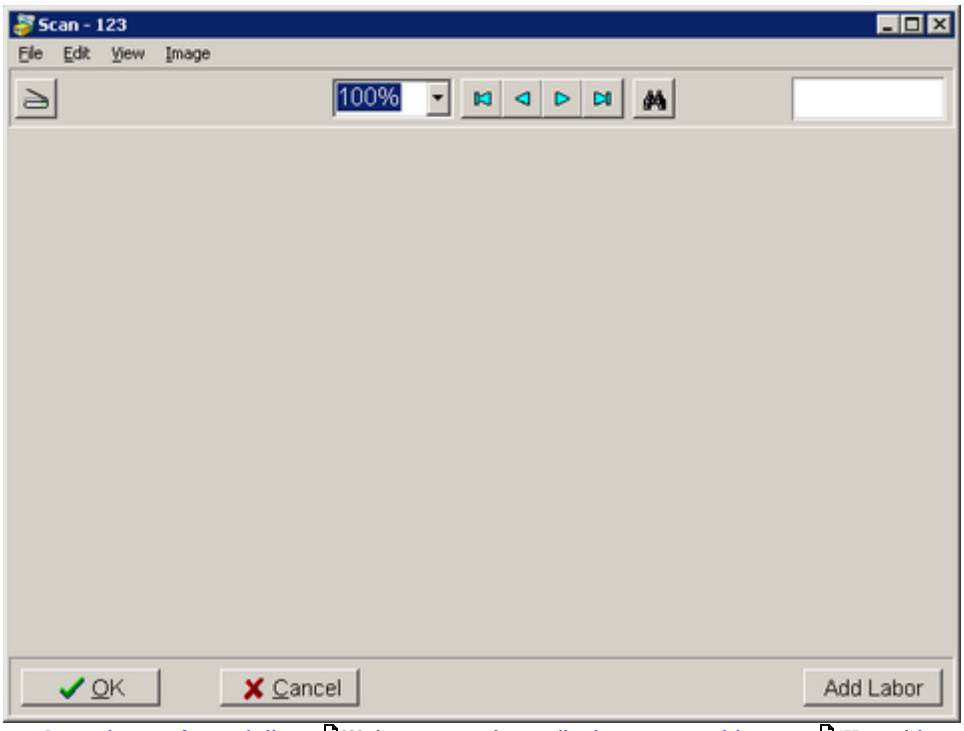

5. Scan items for a delivery[636] (one can also edit the scanned images[477] and import other images[483])
6. When everything is finished, press **OK**.
7. A confirmation message appears : "Save images will become permanent. Confirm ?", press Yes to continue.
8. Scan any additional files on that delivery by repeating the above steps, or click **Cancel**.
9. A confirmation message appears : "Is the delivery completely scanned ?", click **Yes** to terminate the operation.

Notice of the delivery is sent by email to the customer, to the e-mail address of the user associated with the order. (This e-mail includes information about the files scanned and a link for logging into ActiveWeb.)

The delivery is automatically returned, and files may be re-filed[182] according to standard procedures.

8.3.8 Receiving operations

8.3.8.1 Returning deliveries with the PDT

Items arriving at the record center should be processed IN as soon as practical, so that they become available to customers should they wish to order them again. This process is known as returning deliveries.

Deliveries may be returned directly directly through the software or using the PDT. For instructions on returning a delivery through the software, see Returning a delivery[647]. Returning a delivery with the PDT may start at the customer site if you perform delivery with PDT, or it may be done through the same sequence of steps with the PDT, performed at the record center:

To return a delivery using the PDT, without any outgoing items:

On the PDT:
1. From the main menu, press **3**-Processing, **4**-Del/Ret (delivery/return)
2. **Scan** the **delivery slip** of the delivery to be returned.

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3. **Scan** the **transit location label** for the receiving area, or press) to skip.
- Press **1** to scan boxes. **Scan** all **boxes** for the return, then press **0** and **Enter** to return to the previous menu.
- Press **2** to scan files. **Scan** all **files** for the return, then press **0** and **Enter** to return to the previous menu.
4. Press **0** to Quit when there are no more types of items to scan on the delivery.
5. Press **0** to not print any receipts
6. Repeat for all deliveries, then press **0** and **enter** when no deliveries remain to be returned.

To upload the results to EDC:

1. On the compupter, open the **Orders->Return Delivery**.
2. From the menu, select **File->Upload return delivery list from PDT**.
3. Place the PDT in the cradle, ensuring that the green light on the base is on and the black UV windows are aligned for communication.
4. On the PDT, press **2** -Send results, **4** -Delivery / Return, **1** -All
5. Once communication is completed, EDC will ask you whether each return is complete. If there will be no more items to add, click **Yes**. (There will be additional steps if a box requires file tracking 180 .)
6. EDC will ask you whether to print a refile list for each delivery. The answer to this question will depend on how you operate, but is generally **No**.

If there were errors for a return - such as unrecognized bar codes, the status of the delivery will be "Delivered", allowing you to return the delivery manually in the system and correct any errors.

If there were no errors and you told the system that the return was complete, the status of the delivery will be "Returned", and will go to "Verified" once all items have been moved to final locations.

Related topics:

Next steps:
- Returning boxes with file in box tracking 180
- Preparing boxes for reshelving 182
- Preparing files for refiling 182

For more details, see
- Returning a delivery 647
- Adding or removing items from a return 648
- Uploading a return from the PDT 654

8.3.8.2 Returning boxes with file in box tracking

When an account is configured for File in box tracking in the Customer module, when a box arriving at the record center contains inventoried files, the files in the box must be confirmed at a workstation.

When a delivery return is uploaded from the PDT to the workstation, a report will be displayed if some boxes on the delivery return have files that require scanning.

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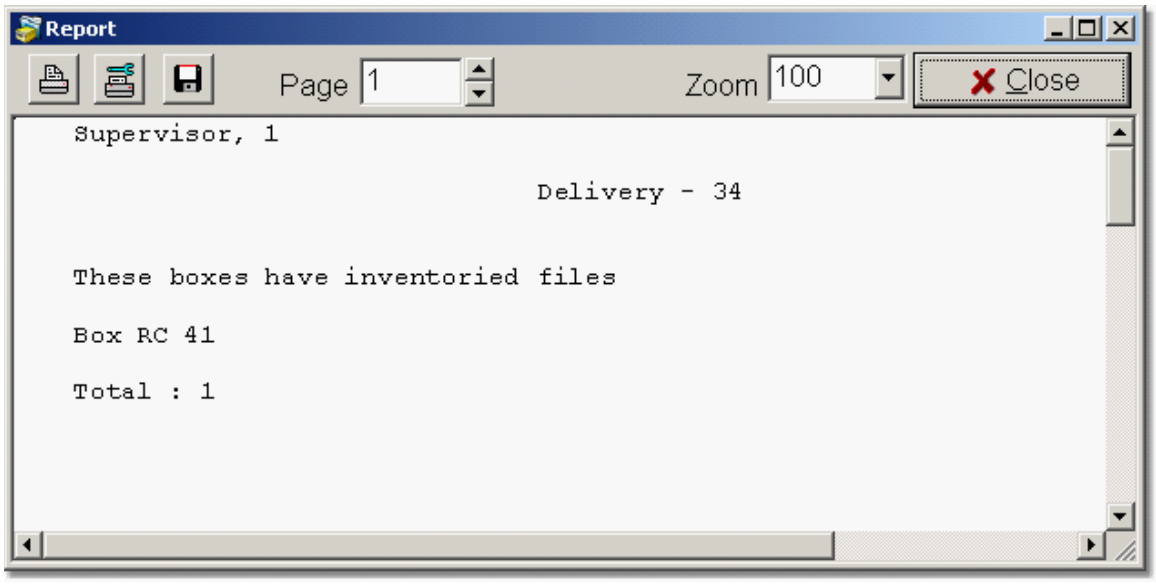
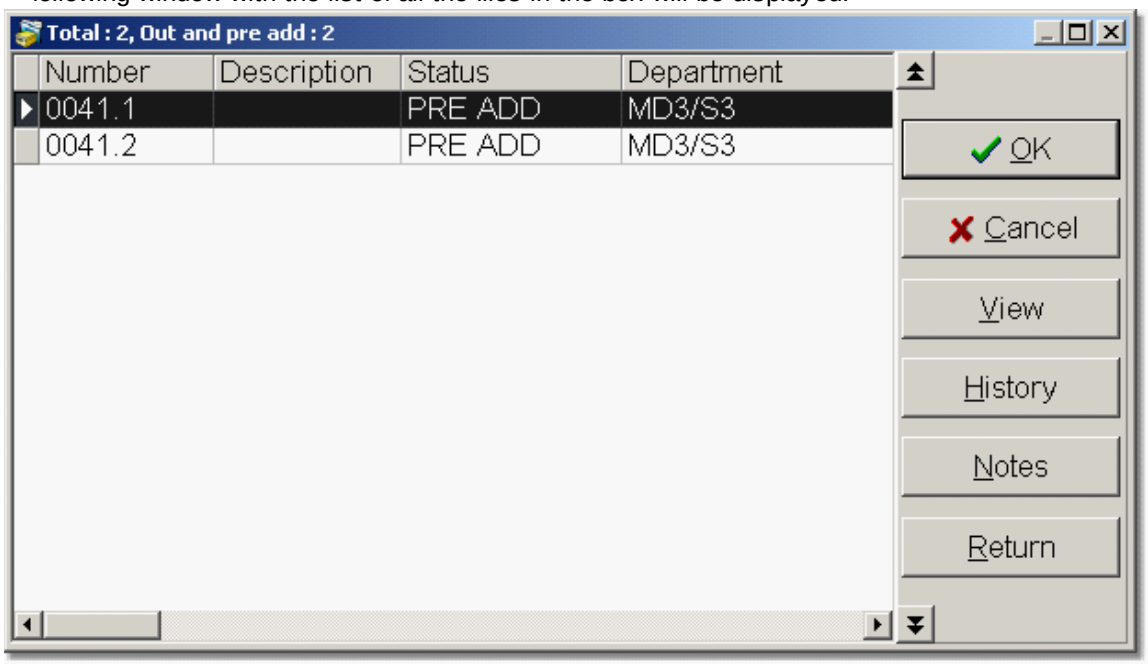


Notice the number of the delivery, as well as the RC number of the box. To finish returning this delivery:

1. Locate the box with files to be scanned, and bring it to a workstation that has a bar code scanner (this is different than the PDT.)
2. In the **Orders->Return Delivery** module, press **F2**, or from the menu, select **File->Return Deliveries**.
3. Enter the delivery number, by scanning the delivery slip or typing the number.
4. Confirm the number of items returned.
5. **Scan** the bar code of the **box**.
6. **Scan** the bar code of each **file** in the box.
7. If some files belonging to the box have not been scanned, the following window with the list of all the files in the box will be displayed:



Pressing the **Return** button on this screen will return the files that are highlighted.

8. When done, click **Okay**, and continue closing the return.

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8.3.8.3 Re-shelving boxes

The re-file process for boxes is done in two steps. The first step is to move the boxes from the transit location to a holding location. The holding location will be an easily accessible location at the receiving area of the record center. Different holding locations are required for all sizes of boxes that the record center can accommodate.

While it is possible to move an item directly to a final location once it has been returned, moving it to a holding location has several advantages:

1. It confirms the size of any new box immediately, so that invoicing will be accurate even if new boxes are not all re-shelved by month end.
2. Sorting items by box type into convenient batch sizes for re-shelving provides a convenient method for ensuring that no boxes were missed in scanning to the shelves.
3. The second move provides confirmation that the size of the box and the size of the location are correct.

The sizing of a box technically only applies to new boxes, but since it is not known which boxes are new and which boxes are returning by visually inspecting them, for consistency, the procedure is identical for all boxes.

To move boxes to a holding location:
1. Select a holding location (sizing cone) of the appropriate size.
2. On the PDT, press **3** Processing, **3** Move, **4** On Shelf
3. **Scan** the destination **location** to "open" the location
4. **Scan** all **boxes** to that location
5. **Scan** the **location** again to close it
6. Repeat for each holding location
7. Press **0** then **Enter** to quit when done

Next, send the results to the computer.
Once items have been scanned to a holding location, the orange cone on the boxes may be used to indicate that they are ready to be re-shelved.

To move boxes to a final location:
- Perform a move using the PDT, using the same steps as above
- After uploading the move list

To verify that all items in the re-shelving batch were scanned:
1. Open the **Orders->Return Verification** module
2. Press **F2**, or from the menu, select **File->View Items in Location**.
3. **Scan** or type the **location bar code** (emptied sizing cone). The report should be empty. If it is not, identify the missing box and scan it to the appropriate location.

8.3.8.4 Re-filing files

Whereas boxes may be moved to any available location of the correct size, files must typically be re-filed into the correct box, which may have moved while the file was out.

As with picking, re-filing may be done by delivery (versus order), but is most efficiently done in larger batches. Therefore, a common practice when files are returned is to do as follows:

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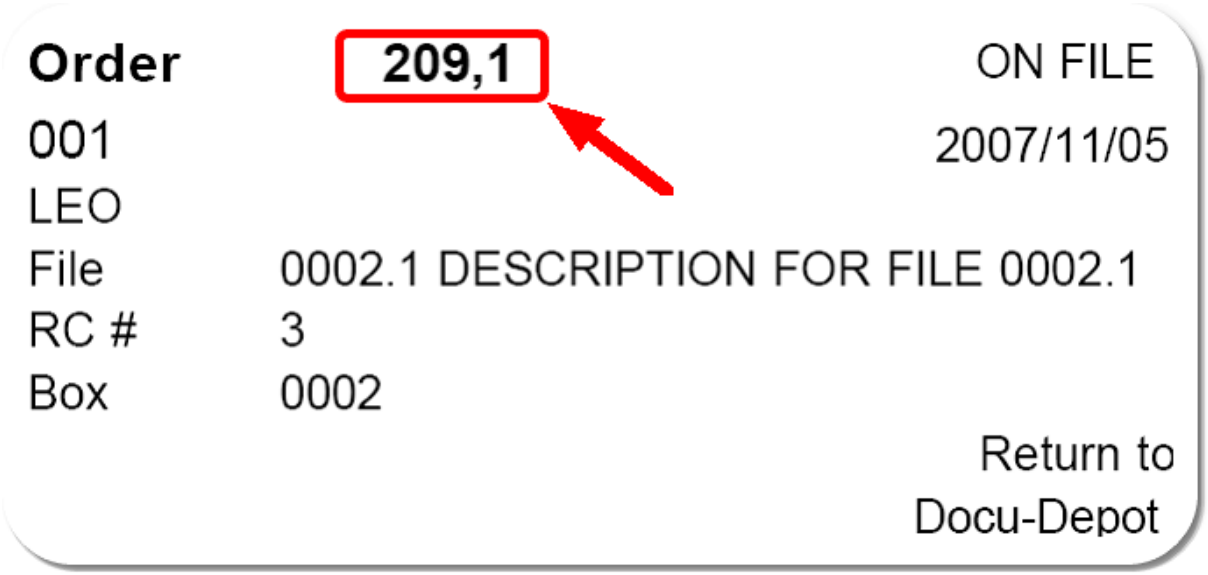
Collect returned files to file transit locations:
Once the file has been returned, perform a move on the PDT to send it to a file transit location.
Note: If a box containing the file is ordered, you will be directed to retrieve the file from the transit location. If the file is ordered, the picking list will also guide you to the transit location to retrieve the file.

1. Select the appropriate file transit location. You may chose to sort files into bins based on the picking level of the source box. Depending on how your system is configured, the original location of the box may be printed on the file picking label.
2. On the PDT, press **3** Processing, **3** Move, **4** On Shelf
3. **Scan** the destination **location** to "open" the location
4. **Scan** all **Files** to that location
5. **Scan** the **location** again to close it
6. Repeat for another location if necessary
7. Press **0** then **Enter** to quit when done

Send the results to the computer, uploading the move list to the **Orders->Return Verification** module.

Re-file the files using File Re-file with PDT.

Once you have collected enough files to refile efficiently, the next step is to sort the files so that you can easily pick the correct file to refile out of the stack of files being put away.



1. Select a stack of files and sort it by the Order and Item number (indicated in red above).
2. On the PDT, from the main menu select **3** -Processing, **5** -File refile.
3. **Scan** the bar code of each **file** to be re-filed.
4. Press **0** -Quit after scanning the last file in the batch.
5. On the computer, open the **Orders->Return Delivery** module.
6. From the menu, select **File->File refile with PDT**.
7. Place the PDT properly in the cradle and press **Enter** once the computer is ready. The computer will upload the list of files, process it, then download the refile list to the PDT.

Processing a Re-file list
1. On the PDT, press **3**-Processing->**2**-Refile.
2. Select the re-file list by pressing the number, egg. **1** (there is usually just one. The most recently downloaded list will have the highest number.)
3. The first item to be refiled, by location order, appears.

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- for inventoried files, scan the file, then scan the box followed by the location;
- for interfiles in an inventoried file, scan the file, then scan the box followed by the location;
- for boxes (or tapes), scan the location, then scan the box (or tape);
- for deletion notices for files, scan the out card, then scan the box followed by the location.

Note : When an item is refiled properly the PDT automatically displays the next item. If there is an error when refiling, the PDT gives a warning sound and does not display the next item. It is then necessary to try again to refile the item or to get through the next item by pressing **2** (Nx) and **ENTER**.

4. When all the items have been refiled the PDT goes back to the main menu.

Upload re-file results to EDC:

5. Open the **Orders->Return Verification** module.
6. From the menu, select **File->Upload refile results**.
7. On the PDT, select **2-Send results** ->**2-Refile**, followed by the list number, usually **1**.

8.3.8.5 Verifying that refiling and reshelving were completed successfully

As seen in the sections on Re-shelving boxes 182, scanning the bar code of an emptied holding location is an effective way of making sure that all items in the re-shelving batch were successfully scanned.

A second important technique is to review the status of deliveries. All deliveries should progress to the Verified state. The list of "Not Verified" deliveries should be monitored daily, and any surprising results investigated to identify which items were not scanned to a final location.

To view a list of not verified returns

1. Open the **Orders->Return Verification** module.
2. From the menu, select **File->View Not Verified Returns|Print Not Verified Returns**. A window appears and asks to enter an interval of delivery dates.
3. Enter the desired date range and press **OK**. The report is displayed or printed.

Note any deliveries that are not in the expected state. A delivery is not verified until all of its items have been verified to their final location.

To investigate which items are not verified:

4. Open the **Orders->Return Verification** module.
5. From the menu, select **File->View items not verified|Print items not verified**. A window prompts for a range of deliveries.
6. Enter the range of deliveries. To investigate a single delivery, enter the same delivery number in the from and to fields, then click OK. The report is printed or displayed.

Once you have identified the boxes or files that were not scanned, see the section on correcting handling errors 184 for tips on correcting them. Once the items have been scanned to their final location, the return and the items will be verified.

8.3.8.6 Correcting handling errors

Move errors can be common mistakes for a Record Center, so it is very important to be able to deal with them. Processing errors will appear in the reconcile process error 185 report, and once they have been corrected they should be marked as "handled".

Many situations can cause a move error, here are a few examples.

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Example 1: An item has been returned to the record center, it was scanned in the Return Delivery module and was put in a transit location. The item was refilled, but the location in which it was put was marked as full in the software, so an error is given after the refilling list is downloaded from the PDT. In this case, one would need to:

In the Management section:
1* Rebuild the Space Usage[401] in order to know if it is only a timing problem (someone was picking a few minutes before and did not download his/her list to the software before the other list was downloaded from the PDT)

In the Inventory section:
2* Search for that specific location in the location module. If the previous step did not change anything in the location, create a report of locations[523] (enter a wide range of locations in order to include as many locations as possible to be able to find the misplaced box or the error).
3* Verify if every location has the right amount of boxes in it. Write down the errors and correct them later or right away.
4* When the box is found, perform a move with the PDT[766].
or
5* Move the box manually, write down the new location. Go in the Box module, click on **Edit->Edit** and enter the new location in the Location field (this is not recommended and only applies for record centers that do not use the PDT).

Example 2: An item has been returned to the record center, but was not scanned in the Return Delivery module. When the box is put in a location and the information from the PDT is downloaded in the Return Verification module, the software will say that the box must be IN before putting it in a location. In this case, one would need to :

1* Find the box.

In the Orders section:
2* Re-open a return.[676] in the Delivery Maintenance module.
3* Return the box manually[647] in the Return Delivery module.
4* Create a refile list[656] in the Return Delivery module.
5* Refile the box with the PDT[182] or with a printed refile list.

8.3.8.7 Reconciling process errors

If there is an error in processing items while moving inventoried items around the record center and on deliveries, EDC RC produces error messages so that the errors can be fixed. It is important to reconcile these in a timely manner, so that your inventory and billing will be correct.

This interface enables you to view process errors and verify that they have been handled.

1. Click on **Orders->Delivery Maintenance** from the Main window.
2. Click on **File->Reconcile process errors**

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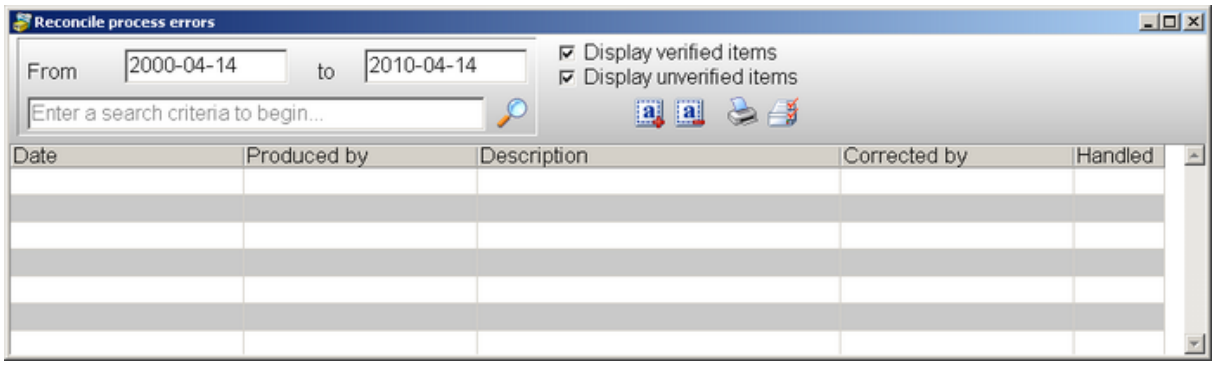

- In the From and To fields, enter a date range over which to view errors, then click the search glass icon.
- You may limit results by entering search criteria, such as an employee name.
- To display only error that have not yet been handled, ensure that only the "Display unverified items" box is checked.
- To mark errors as verified error, highlight the errors and press [Space]. Pressing the a+ icon will select all times.

8.3.9 Tape management

8.3.9.1 General concepts in tape management

Many record centers offer their customers secure off-site storage of their digital back-up back-up tapes.

Key factors that make tape management different from physical records management:

Additional security precautions are necessary. Much more information is stored on a tape than in a box of paper. If encryption on the data is cracked or absent, it is in a format that can be easily searched and distributed. The consequences of security breaches can be huge.

Therefore:
- Tapes are stored in locked vaults, within secure record centers.
- Transport containers containing tapes are typically locked during transportation.
- Clients may require that their tapes be transported within unmarked vehicles.
- The recipients might be required to prove their identity before receiving the tapes. If your driver cannot find an authorized recipient to deliver to, the items will be shipped back to the record center at the client's expense.

Tapes are also protected against fire and changes in temperature and humidity.
- Temperature and humidity are continuously monitored, recorded and controlled in tape storage vaults.
- During transportation, transportation cases provide insulation.
- Transport vehicles may be climate controlled.
- During handling, LTO tapes are always kept within in their transparent plastic cases.
- Vaults have advanced fire suppression systems that do not damage the tapes.

Vault storage is more expensive per volume.
Because it is possible to store tapes in regular storage and standard of extreme sensitivity in vault storage, the box type module has a separate set of price codes for *regular storage* versus *vault storage*.

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In the location module, vault locations must have the vault location flag set, whereas regular locations should not.

When items are created, they are assigned either vault or regular storage. EDC RC protects the record center against accidentally moving an item into the wrong type of storage. Specific procedures exist for transferring items between regular and vault storage.

Backups expire and tapes get re-used.
Most back-ups are useful to a company for a limited time. A typical company might have different information that is backed up yearly, monthly tapes kept for a year, daily back-ups kept for a week, and special-purpose back-ups. Once the information on a tape is expired, it is no longer valuable but it remains a security risk.

Three different models for cycling tapes:

1. Tape rotation
This is the traditional way of handling tapes in EDC RC. Each tape is assigned a rotation schedule. For a customer with daily service, a *'Monday night back-up tape'* might be dropped of at the client site every Monday to be overwritten, overwritten overnight, and retrieved the next day when the '*Tuesday night*' tape is dropped off. With this model, the schedule of each tape is established in advance.

Advantages of tape rotation:

- Setting up a rotation is a one-time effort (you may establish e.g. 5 years of delivery dates at once.)
- Tapes have consistent identity, making it easier to confirm that you are not overwriting valuable information.

2. Scratch pool / Client return dates
In this model, each tape is given a '*client return date*' as the backup is written and the tape is sent to the record center. The tape is stored at the record center until the usefulness of the data on it expires, at which point it is returned to the client.

This returned tape is now part of the *'scratch pool'* of tapes, available for writing the next back-up on.

Advantages of this method:

- Useful for companies that have more unstructured requirement, including backing up various computers at irregular intervals.
- Useful for companies that have other software applications that dictate which backup tape is required when and how long backups are to be kept for.

3. Automated tape management software (TMS)
Companies that do a lot of work with backing up data may have automated tape management systems. These systems may automatically request back-up tapes as they are required for restoring data or overwriting and may also specify which tapes the record center should pick up to store, how long these tapes should be kept, and what the tape contains.

Such systems are generally capable of producing structured output that can be automatically sent by FTP or e-mail. With some scripting, it is possible to configure an application called the order processor of EDC RC to automatically update record meta data, return dates, and orders.

Two reasons for delivering tapes to a client

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Most tapes are delivered to the client to be overwritten. Such deliveries are generally scheduled in advance as part of a tape rotation schedule or using a client date. The information on these tapes is no longer valuable.

In contrast, other tapes are recalled for restoring data. These unscheduled orders are for data that may be very important to the company. Since most tapes shipped at the same time are destined to be overwritten, it is critical that these two types of tapes be kept separate.

Additional ways that tape service differs from paper records management

Transportation

- Tapes are transported in transport containers.

Storage

The dynamics of tapes moving in and out storage is different from that of boxes. Tapes often circulate in sets and the next delivery date of tapes can often be predicted. Therefore be practical to store tapes to optimize subsequent retrieval.

In contrast with boxes that may be stored 9 boxes per location with 2/3 of boxes are hidden from view, tape storage systems often have many more tapes per location, all of them easily visible.

Boxes are typically heavy and inactive, so it is advantageous to store boxes in the first convenient spot and hang onto them until they are destroyed. In contrast, tapes are light and active and largely predictable, so many record centers chose to keep the tapes belonging to the same account together.

Furthermore, since tapes are easier to move around, much more time is spent driving a delivery route than picking and refiling the items for it. Therefore, it may be practical to have a driver that becomes familiar with the route look after the picking and refiling of items on their route, in order to optimize efficiency and accuracy based on the patterns that they observe.

8.3.9.2 Setting up for tape management

Labeling tapes

One early decision that you will have to make when managing tapes is what type of tape labels to use. People often opt for labels 0.5" high by 2.5" wide. This permits the label to include minimal information such as the account key and tape number, as well as a bar code that can be easily read.

EDC

- Ensure that your labels use a permanent adhesive and are of high quality. Having a label come off in a clients computer could be costly.
- Ensure that the ribbon type is designed to work with the label type that you have selected (polyester or paper-based).
- You may chose to use a ribbon that is wider than the label. Record centers have observed that 4" wide ribbons are less likely to get jammed than narrower ones.
- Record centers with sufficient activity usually have a dedicated thermal printer that they use only for printing tape labels (as opposed to box labels and file picking labels).

Attach labels somewhere that meets the following conditions:

- The label will not be damaged or dislodged when the tape is inserted into the drive or handled by tape robots.
- The label can be visible to you when the tape is in its storage location, potentially within its case

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- If the tape is stored in a transparent case, the label can be scanned without opening the case.

Some customers may not permit you to label their tapes. EDC is capable of working with alternate bar codes. However, there are advantages to using EDC RC labels.

Possibility of duplicate bar codes:
- EDC will not accept the same bar code for two different items within the same account. It can accept the same bar code for items in two different accounts.
- If a bar code belongs to more than one item in the record, any operation where the identity of the item cannot be determined will not work. Picking, truck validation, delivery and return with PDT, and re-shelving with refile lists all function. Relocation the item using a move on the PDT or searching for the item in the box module by bar code will not work.

Difficulty determining which account an item belongs to
- With EDC labels, you can easily match the customer key on delivery slips to that on tapes by eye. With out them, it might be difficult to do this without scanning the item.

For instructions on configuring label templates, see (Configuring label templates)205

Printing tape labels
If you assign a tape number for the tapes of a given account, new tape labels are printed by auto-creating preadd tapes.

1. Ensure that the thermal printer that you will be printing to has tape labels in.
2. Open the **Maintenance->Box and file maintenance** module.
3. From the menu, select File->Auto create
   Open the

If you desire additional tips on working with the layout editor, please see the Report Builder tutorial.

Setting up tape locations
Tape locations are set up in the same way as box locations. They can be created individually, auto-created in batches, or imported from spreadsheets.

You may wish to use smaller labels for labeling your tape locations. In this case you may wish to have two different location label templates saved outside EDC RC. To switch between formats you would open the label template editor then select the appropriate RTM file.

8.4 Processing withdrawal lists

8.4.1 Destroying items

Destroying items by pallet

The disposal of items by the record center requires detailed authorization from the customer. Customers may create and authorize disposal lists using ActiveWeb, or these lists may be created in EDC RC through the Disposal list module, printed and sent to the customer for authorization of each box by the customer. The list is then modified or authorized in EDC. (To authorize disposal, a user must be identified as a list signing officer305.)

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Disposal lists must be created and authorized before performing this procedure.

In the Inventory section:

1. In the Disposal List module, Create[539] | Auto-create[542] | Multi-client Auto-create[543] a disposal list.
2. Create|Print a report[549] for the customer and send it to customer(s)
3. After customer approval is received, authorize the list[544].
4. Create a by-pallet disposal list[545]
5. Send the pallet picking list to the PDT[546]
6. Pick the items with the PDT[547]
7. Receive the pallet picking list from the PDT[546]
8. Verify the items with the PDT[547]
9. Receive the pallet verification list from the PDT[546]
10. An order and a delivery are automatically created for billing purposes.

Note: If a problem occurs while picking, one can reset the pallet picking list[546]. The state of the boxes that are on a pallet is changed to OUT after picking and to DESTROYED after the pallet has been verified.

Note: Before destroying items, a delivery type must be created, so the destruction of the items can be billed. The settings are: Ship mode - Regular and Courier - External. The delivery type to use for billing of various withdrawal lists is assigned in the Management->System Information[370] module.

8.4.2 Permanently transferring items to another site

In the Inventory section:

Typically, a customer will initiate the transfer with a request. The record center then generates a transfer list and sends it to the customer. The customer reviews the list, initialing each item and authorizing the list with a signature from a user identified as a list signing officer[305].
Once the any modifications have been made and the list is authorized in

1* In the Transfer List module, Create[554] | Auto Create[556] one or many list(s)
2* Create|Print a report[561] for the customer and send it to customer(s)
3* After customer approval is received, authorize the list[560].
4* Create a by-pallet transfer list[557]
5* Send the pallet picking list to the PDT[558]
6* Pick the items with the PDT[560]
7* Receive the pallet picking list from the PDT[558]
8* Verify the items with the PDT[561]
9* Receive the pallet verification list from the PDT[558]
10 An order and a delivery are automatically created for billing purposes.

Note: If a problem occurs while picking, one can reset the pallet picking list[559]. The state of the boxes that are on a pallet is changed to OUT after picking and to DESTROYED after all the items on a pallet have been verified.

Note: Before transferring items, a delivery type must be created, so the transfer of the of the items can be billed. The settings are: Ship mode - Regular and Courier - External. The delivery type to use for billing of various withdrawal lists is assigned in the Management->System Information[370] module

* steps followed by a star are compulsory

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8.4.3 Permanently removing items from the inventory

In the Inventory section:

1 In the Deletion List module, Create[566] one or many list(s)
2 Create|Print a report[571] for the customer and send it to customer(s)
3 After customer approval is received, authorize the list[569].
4 Process the list[569].
5 A delivery is automatically created for billing purposes.

Note: Before deleting items, a delivery type must be created, so the deletion of the items can be billed. The settings are: Ship mode - Regular and Courier - External. The delivery type to use for billing of various withdrawal lists is assigned in the Management->System Information[370] module

Note: When ordering items it is also possible to check the Permanently Out check box. As soon as the items will be delivered they will be marked as DELETED.

Note: If deleted box is returned to the record center, it will is returned to active storage. The files that were deleted at the same time are returned in as well, unless the customer requires file in box tracking, in which case the files will have to be scanned in.

8.4.4 Deleting a box, a tape or a file from the database

This procedure will allow you to delete an item from the database.

WARNING: When an item is deleted from the database its history is also deleted. The procedure cannot be undone. Moreover, the deletion of one item in the database can create problems in relation with other histories (ex: deliveries, orders, etc.). It is better to delete a box by adding it to a deletion list[565] and leave the history in the software, than deleting it completely from the database.
For customers replicated with EDC ActiveFile: if you delete an item from the database at the record center, the item will not be deleted from the database in EDC ActiveFile, since the replication has to do with the history of that item. Since the item is deleted, the software doesn't recognize the changes performed since the box is absent from the database (the comparison between databases is not valid).

1* Make sure you really want to perform this operation.
2* Select the item(s) to delete from the database. Make a list and save it so you know which boxes are deleted.

In the Maintenance section:
3* Go in the Box and File Maintenance module -> **Edit** -> **Edit Box|File history**
4* Enter the customer code or to have the list of customers press **OK** (select a customer and it will appear highlighted). Press **OK**.
5* Enter the box|file RC number and press **OK**.
6* Select all history containing the ADDED or the IN status (they will appear highlighted when selected) and press the **Delete** button.
7* Go back to the Box and File Maintenance window -> **Edit** -> **Transfer Box|File to Pre Add**
8* Enter the customer code or to have the list of customers press **OK** (select a customer and it will appear highlighted). Press **OK**.
9* Enter the box|file RC number and press **OK**.
10* The box|file will automatically be transferred to the PRE ADD state.

For files, tapes and boxes without files

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In the Inventory section:
11* Go in the Box|File module -> Select the box|file to delete -> **Edit** -> **Delete pre add**
12* The box|file will automatically be deleted.
13* Repeat steps one to twelve for each item you want to delete from the database.

For tapes and boxes with files

In the Maintenance section:
14 Go in the Remove PRE ADD module -> **File** -> **By number | Manual selection**
15 Enter the customer code or to have the list of customers press **OK** (select a customer and it will appear highlighted). Press **OK**.
16 If you have chosen By number : enter a range of Box numbers and press **OK**. A confirmation message appears : " Accept trailing numbers? (Example: 100B1 = 100). Press Yes to accept, No or Cancel to refuse.
If you have chosen Manual selection : enter a box number to indicate where to start the list and press **OK**. Select the boxes you want to delete (they will appear highlighted) and press **OK**.
Note: All the files from the boxes(s) will be deleted automatically along with the box.

Note: If you want to remove all pre adds from the database for a customer (*which is not advisable*), go in the Maintenance section in the Remove PRE ADD module -> **File** -> **Delete all "PRE ADDS"**. Select a customer either by entering the customer code or by pressing **OK** to have the list of customers (the customer selected will appear highlighted), and press **OK**. A confirmation message will appear, press Yes if you want to go on with the procedure and No or Cancel to abort the operation.

* Steps followed by a star are compulsory
** If the customer is still linked by EDC ActiveFile software, it is possible that the deletion of history might not work since an automatic replication of data is done a few times a day. So there is a chance that the history might automatically come back.

8.5 Invoicing

8.5.1 Invoicing

Invoicing is a routine part of your company's operations. If you have not already done so, please obtain an invoicing standard operating procedure (SOP) template from DocuData and customize this to create a detailed checklist with the steps and details that you require to perform invoicing.

This section of the manual contains more details about invoicing, as well as set-up steps, variations, and trouble-shooting.

It is assumed that you have already configured done the following:
- Configured the delivery types for the services that your record center provides.
- Configured box type for any box volumes that you do not with to bill for by cubic foot using default price codes
- If appropriate, configure price codes for shredding containers**, web licenses**, transport container rental**, location rental**, minimum invoice amounts**, labor rates**, etc.
- Set up accounts, including billing options and customer price overrides if necessary.

Invoicing procedures:

During the month:
1. Accumulate charges
Storage charges

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Delivery and service charges

Non-standard billing situations

Recurring line-item charges

Individual charges not associated with an existing delivery

At month end:
2. Ensure that all deliveries for the invoice period are return and non-standard boxes have been sized.
3. Prepare to invoice
4. Create invoices
5. Review invoices and adjust if necessary
6. Print or e-mail finalized invoices
7. Export information to your accounting system
8. Run commissions report

Annually: apply cost of living adjustment

8.5.2 Running Monthly Billing

Billing should be performed systematically and attentively, as it is vital to the relationships between a record center and its customers. Your record center-specific and customer-specific procedures should be well documented in your own manual of standard operating procedures. Use the following as a guideline.

Prepare for billing, and identify which customers require manual invoicing.

1. In the **Orders->Delivery Verification** module, view the **File->Not verified returns** report, and ensure that all deliveries for the period to be invoiced have been returned, and that all new boxes have been properly sized. (Typically by moving them to a permanent location or a holding location with a defined size.)
2. In the **Accounting->Invoicing** module, select **Create->View | Print excluded from selection**[707].

(Note that any invoices for these customers will have to be created individually. In the absence of reasons for requiring manual invoicing, consider setting the Auto-invoicing option to Yes for these customers in the **Customer->Customer information** module. Information on which customers are invoiced manually should be available and tracked in your operations manual.)

For customers that do not use auto-invoicing:

3. Preview invoices[704] and compare them to invoices from previous months to see if the current total is consistent with the, other totals. If any doubts arise, go see the invoices and figure out the problem.
4. Create invoices manually[692] for these customers (when needed).
5. Verify the invoices to ensure that some costs were not forgotten or mistakenly added.
6. If some errors are found, edit the invoice(s)[693] or edit the items within the invoice(s[701]) and reprint them.

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For customers that use auto-invoicing:

7. Create an auto-selection of invoices[695]. (**Accounting->Invoicing, Create->Auto Selection)**
8. Edit the auto-selection (**Create->Edit Selection**), putting invoices on hold if awaiting completion of work, or confirmation from service record centers.
9. Create the invoices[698] and double-check them for charges that may have been forgotten or mistakenly added.
10. When all invoices are correct, print[698] them and send them to your customers (either by email or by mail). The invoices will be printed, along with any attachments specified in the Customer Information[265] module.
11. When invoices that were on hold are ready, edit the selection to take them off hold, and create, verify, and print the invoices as above.

Note : To send invoices by email, go to the **Customer->Customer Information** module. Click on **Edit**, and in the Billing section, enter one or many email addresses in the "Email" field (if there are more than one, separate them with a comma). Go in the "Invoice format" field and check the "Electronic" box and select the file type (PDF or TIF).

12. View the "Unbilled customers"[708] report.
13. Create invoices manually[692] for any customers that have not been billed.
14. Export your invoices[700] if you use an accounting software.

For service only customers:

15. See the topic Creating service only invoices[709]

8.6 Report, labels, and custom invoice layouts

8.6.1 Working with the Design tab for custom reports, labels, and invoices

The purpose of this section is to help you to make common modifications to reports that are close to what you need. It also presents some resources that are specific to *EDC RC*. For a full generic tutorial on working with the Report Builder tool, please feel free to download and install the report builder tutorial through out website.

Open the report in edit mode

1. Open the **Inventory->Report** module
2. Click on the **Edit** button
3. Double-click on the report that you wish to modify.
4. Click on the **Design** tab.

To save the current report design outside EDC RC

1. From the menu, select **File->Export**.
2. Choose a name and a location for your report.

Note: This saves the report definition as a text file with the extension .RTM. To use the rtm file, import it back into EDC. This is useful for copying and adding reports, saving different versions of items including invoice templates and label template, or exchanging reports between different record centers.

To import a report design into EDC RC

1. From the menu, select **File->Import**.
2. Locate the report (.rtm) file that you wish to import

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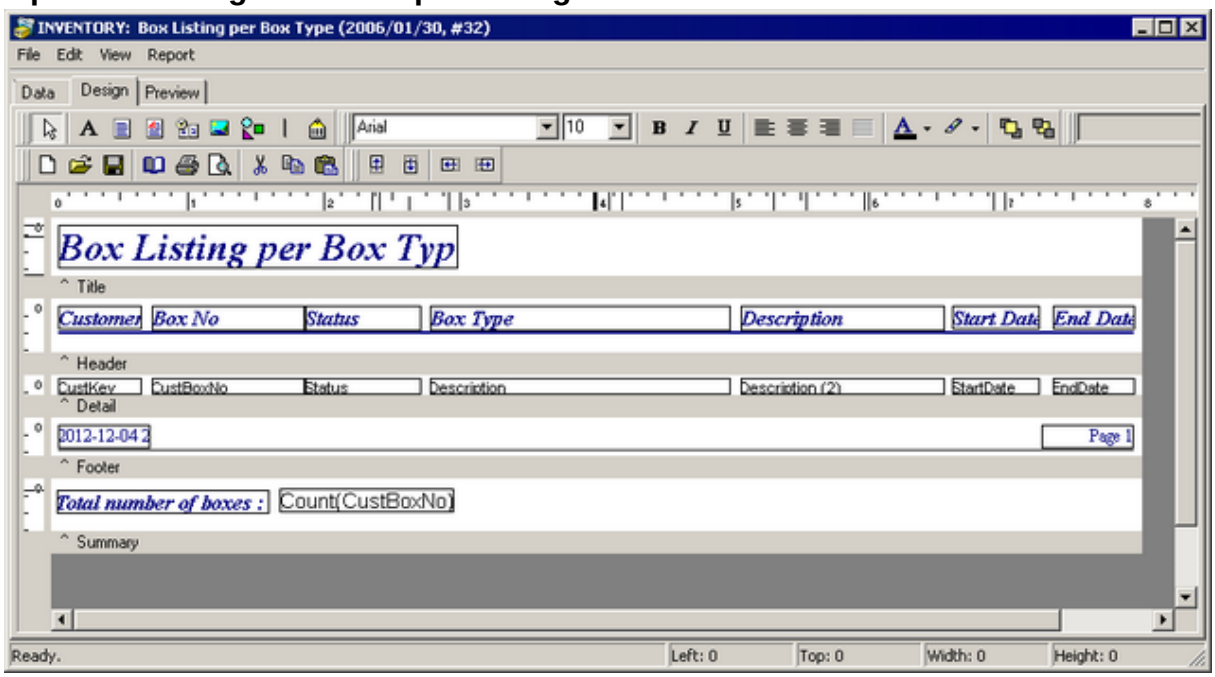
To create a new using the Report Wizard

Before you can create a report layout using the wizard, you must have a query to work from. (Please see Modifying the data query of a custom report 198 if you require details.)

1. From the menu of the **Data** tab, select **File->New...**.
2. Double-click on the **Report Wizard** icon.
3. Follow the prompts to create your report.

Tips on working with the report Design tab



Display all of the available tool-bars:

From the menu select **View->Toolbars**, and check off the tool-bars that you wish to use. You can discover may techniques by exploring these tool-bars.

Note that there may be many ways of accomplishing the same result. The following is intended to provide some helpful suggestions.

Operation	Steps
Add new fields with labels	• If the data tree is not displayed, from the menu select **View->Toolbars->Data Tree**.

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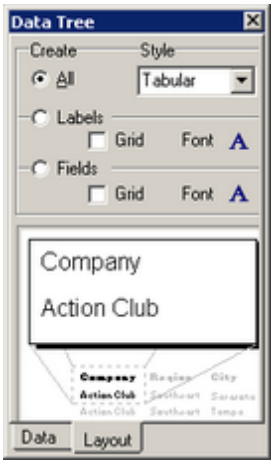

- For typical report, set the Style to Tabular.
- For the labels and for the fields, click the Font icon (A) if you wish to change the font to something different than what is displayed in the preview.
- Return to the Data tab of the data tree.
- Drag and drop fields from here onto your report.

Add data components
- Text fields
- Memo field
- Calculations
- Bar codes

- On the data components toolbar ( ), click the icon for text field, memo field, calculation, or bar code respectively.
- Click on the report where you wish to position the element.
- With the edit toolbar (

), associate the component to a field in the query.
- To adjust additional parameters, right-click on the component and explore the menu that appears.

Text fields:
- These are intended for single-line fields. If you want something that can expand to multiple lines, use a memo field.
- To change the display format of dates and currency values, right-click on the field and select **Display Format..**.

Memo (Notes) fields:
- In the right-click menu, you may wish to set the field to **Stretch**, if it is of variable length.
- If you have fields below a field that might expand, use the '**Shift relative to**' setting to ensure that the lower fields get pushed down to make room.

Calculations

If your report has groups applied to it, you may create summary calculations (such as counts or totals) directly on the report.
- From the right-click menu, select **Calculations**.
- Set the calculation type and reset group then click okay. (The reset group determines the scope of the total. For example, if your report is grouped by department and by customer, a departmental total would use the department as the reset group. Using the customer as the reset group would give you the total for multiple departments).

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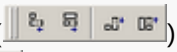
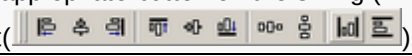
	• In general, you will want to select the **look ahead** setting to get a summary of all of the values for the group. If this is not selected, you will get the running summary of values for the reset group that will not include any values that appear below the current line of the report / query. **Note:** More complex calculations can be done in the query. For the purpose of the report though, these are treated like any other query field. **Bar Codes** • In the right-click menu, select the **PrintHumanReadable** option if you want the text of the bar code to appear as part of the bar code. (I find that keeping the text and the bar code separate gives greater flexibility.) • Turn off the AutoSize and AutoSizeFont settings to give you better control of the height of the bar code. • To make the bar code more compact, from the right-click menu, click on **Configure Bar Code**. Code 128 is more compact than code 39. You may also adjust the bar width and ratio, but test to ensure that your labels can be read by the PDTs.
Change the content of a label or field	• Select the field or label. The content of the Edit toolbar will change. • Either type a different value or select a different value from the drop-down list.
Reposition a field	• **Click** on the field so that boxes (or 'handles) appear around its border. • Hold down the **Ctrl** key, and press the **arrow** key in the direction that you wish to move the field.
Re-size a field	• **Click** on the field so that boxes (or 'handles) appear around its border • Hold down the Shift key, and press the **arrow** key to adjust the height or width.
Adjust multiple fields to the same size or alignment	• If the size and alignment tool-bars are not displayed, from the menu select **View->Toolbars->Data Tree**. • Select the item with the size or alignment that you wish to copy to the others. • Hold down the Ctrl key and select the other items. • Click the appropriate button on the sizing () or alignment() toolbar.
Add an image	1. On the **standard components** toolbar ( ), click the **image** button. 2. Click on the label approximately where you wish to place the image. A box labeled *Image1* will appear. 3. Right-click on this box to bring up a right-click menu. • Click '**...**' to **select the image** that you wish to add. Navigate to the image and select it. • Right-click again select '**Stretch**' and '**Maintain aspect ratio**'. 4. Click on the **Preview tab** to get a sense of how the label might look. **Tips on adding images to black and white labels** • Start with an image that is monochrome. Grey-scale and color

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	images convert badly into black and white. One option is to use Microsoft Paint (which is provided with Windows), and save the image as a monochrome bmp file. • Use an image that is several times higher resolution than your thermal printer. This helps diagonal and curved edges of the image to come out nicely.
Change the page size or layout	• From the menu on the design tab, select **Edit->Page Setup...**. • Click on the **Paper Size** tab. **Note on changing between portrait and landscape layouts:** If the you are working with labels or reports that come out of your printer sideways, select landscape, otherwise leave the paper orientation as landscape. Note that if you make the page width narrower, you are warned that label elements outside the new page width will be lost. To get around this problem while switching between portrait and landscape orientations, 1. Set both the height and the width of the page to the larger of the two dimensions. 2. Change the orientation setting 3. Set the height and the width to the correct dimension.

To save the changes to the report

When you exit the report editor from edit mode you will be prompted 'Save Changes?' Click **Yes**.

If you are not in edit mode, you can save your report design outside EDC then import it back in when you are in edit mode as follows:

1. From the menu of the design tab, select **File->Export**.
2. Choose a name and a location for your report

8.6.2 Modifying the data query of a custom report

The purpose of this section is to help you to make common modifications to reports that are close to what you need. It also presents some resources that are specific to *EDC RC*. For a full generic tutorial on working with the Report Builder tool, please see http://www.docudatasoft.com/supportfiles/tools/report_builder_tutorial.zip

Open the report in edit mode

1. Open the **Inventory->Report** module
2. Click on the **Edit** button
3. Double-click on the report that you wish to modify.
4. Click on the **Data** tab.

To create a new query using the Query wizard

1. From the menu of the **Data** tab, select **File->New...**.
2. Double-click on the **Query Wizard** icon.
3. Follow the prompts to create your query.

Tips on working with data using the query designer window

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- Clicking the **preview** icon ( ) will cause a preview of the query results to be displayed. Testing your query on this smaller data set can save you time, since only the first 100 records are displayed.
- Clicking the **tables** icon ( ) opens the tables tab of the query designer. This is where you can modify which tables are included and how they are joined. If your data has no records or too many records, the problem may be with how the tables are joined.
- Clicking on the **fields** icon ( ) brings up the list of available fields from the included tables. The fields that are included in query appear in the lower pane while those that have not been included appear above.

- Double-click on a field in the top pane if you wish to add it to the query.
- Double-click on the field in the lower pane to remove it from the query.

- If you wish to rename a field, click on its name in the lower pane so that it is selected, the click it again so that you can type over the existing name. (Be careful not to double-click as this removes the field). If you rename fields that require it before adding them to the report, they will be labeled correctly when you create the report using the report wizard or add the field using the data tree.

- Clicking on the **calculations** icon ( ) opens the calculations tab of the query designer. This is where you can do things such as:

- Add **summary calculations**: (Sum, Count, Average, Minimum, Maximum).
  To add summary calculations:
  - Double-click on a field in the Available Fields pane to add a calculation based on it.
  - In the Calculations pane under the Function column, select the desired function.

  Note: Summaries are applied to groups of records (e.g. count of boxes with the 'IN' status, or sum of invoice totals for a specific invoice creation date. This requires that the report be grouped. (See the next tab)).

- Add **calculated expression**. This is used for adding box notes, translating status codes into their corresponding terms (e.g. box activity 2='Out'), or running more complex functions.
  To add a calculated expression:
  - Double-click on a field in the Available Fields pane to add a calculation based on it. (Any field from the correct table will work.)
  - In the Calculations pane. under the Function column, select Expression.
  - Click under the Expression column and type or paste in your expression.
  - Once the expression is added, you may click the field name twice (slowly) to rename it.

  Sample expressions:

Description	Expression	Comment
Notes fields		
Box	GetBoxNotes(Box.CustNo, Box.BoxDDNo, 3000)	The last parameter is the MaxLength value. To permit a longer maximum length, increase this value.
File	GetFileNotes(File.CustNo, File.FileDDNo, 3000)	
Bar codes		
Box	GetBoxBarcode(CustNo, BoxDDNo)	If you include multiple tables in the query that have the same field in it (such as CustNo), you will need to preface the field name with the table name. (e.g.

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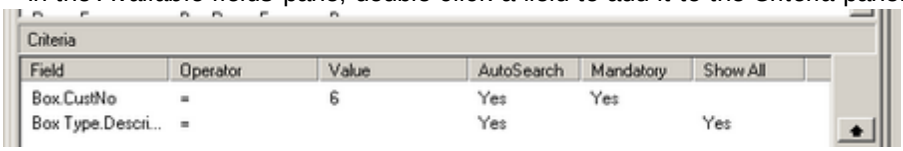
Tape	GetBoxBarcode36(CustNo, BoxDDNo)	Box.CustNo or File.FileDDNo).
File	GetFileBarcode(CustNo, FileDDNo)	
Location	GetLocationBarcode(Location)	
ActiveFile location	GetActiveLocationBarcode(Location, LocationType)	
Employee	GetEmployeeBarcode(EmployeeNo)	
ActiveFile User	GetUserBarcode(CustNo, UserNo)	
Translate box activity codes to item status		
if(box_history.Activity=1, 'IN', if(box_history.Activity=2, 'OUT', if(box_history.Activity=3, 'SELECTED', if(box_history.Activity=5, 'PRE ADD', if(box_history.Activity=8, 'ON DISPOSAL', if(box_history.Activity=9, 'ON TRANSFER', if(box_history.Activity=10, 'ON DELETION', if(box_history.Activity=11, 'DELETED', if(box_history.Activity=12, 'DESTROYED', if(box_history.Activity=13, 'TRANSFERRED', if(box_history.Activity=14, 'IN (IN-HOUSE)', if(box_history.Activity=15, 'OUT (IN-HOUSE)', if(box_history.Activity=36, 'REVISED', if(box_history.Activity=35, 'SAMPLED', if(box_history.Activity=37, 'SENT TO DEPOT', if(box_history.Activity=27, 'DESTROYED (IN-HOUSE)', if(box_history.Activity=32, 'PRINTED',if(box_history.Activity=39, 'ADDED',if(box_history.Activity=6, 'MOVED', 'end'))))))))))))))))))))		
Translate invoice item groups to header names		
if(invoice_item.itemgroup=1, 'STORAGE', if(invoice_item.itemgroup=2, 'LABOR', if(invoice_item.itemgroup=3, 'COURIER', if(invoice_item.itemgroup=4, 'INVENTORY LIST', if(invoice_item.itemgroup=5, 'IMAGING', if(invoice_item.itemgroup=6, 'OPEN SHELF', if(invoice_item.itemgroup=7, 'SHREDDING/RECYCLING', if(invoice_item.itemgroup=8, 'SUPPLIES', if(invoice_item.itemgroup=100, 'MISCELLANEOUS', 'Unexpected group number - contact DocuData'))))))))		
Price code units		
If(price.unittype=0,'Units',If(price.unittype=1,'Minutes',If(price.unittype=2,'Cubic Feet',If(price.unittype=3,'Megabytes',If(price.unittype=4,'Linear Feet',If(price.unittype=5,'Deliveries',If(price.unittype=6,'Pounds','Unknown'))))))		

For a longer list of activity codes, please see topic on activity codes[773] in the appendix

- Clicking the **search** icon ( ) opens the search tab where you can view or modify existing criteria and and new ones.

To add or modify search criteria:

- In the *Available fields* pane, double-click a field to add it to the *Criteria* pane.



- In the *Operator* column, select the desired comparison type.
- In the *Value* field, enter the value to compare.
- If you wish to be able to modify the search criteria from the preview tab of the report, set the value in the *AutoSearch* column to *Yes*.
- To inactivate a search criteria without removing it, set the value in the *Show All* column to *Yes*.
- If you do not want to have the option of showing all values, set the value in the *Mandatory* column to Yes.

- Clicking on the **sort** icon ( ) displays the lists the order in which the report is sorted. If you intend to apply grouping or sorting to the report, it is generally a good idea to apply the corresponding sorting to the query that the report is based on.

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- If your data set has multiple queries, clicking the **link** icon ( ) lets you edit the way that the queries are linked. This is useful for advanced reports that use regions or sub reports. If you wish to know more about this advanced topic, please explore the Report Builder tutorial.
- Finally, clicking the **SQL** editor icon ( ) displays the SQL statement that you have created through the graphical interface. Avoid accidentally modifying the query in this way, as once this has been done you will no longer be able to use the other tabs of the query designer for this query.

8.6.3 Running custom reports in the report module

Here is a list of potential interesting custom reports and comments on how to use them. Please also see List of favorite reports 853

Original report name	Description	Comments
INVENTORY: Destruction Certificate (2011/05/30, #110)		
ACCOUNTING: Generic invoice data export (2011/09/28, #119)		
ACCOUNTING: General Pricing (2005/11/28, #14)		
ACCOUNTING: Invoice summary by category for creation date range (2011/04/18, #10		
ACCOUNTING: Invoice summary by price code with category totals (2011/05/30, #111		
INVENTORY: Disposal List (2008/03/27, #89)		
INVENTORY: Location Labels (2011/05/12, #109)		
INVENTORY: Invoice line item shredding certificate (2011/07/07, #114)		
INVENTORY: Location Labels (2011/05/12, #109)		
LABELS: Generic Bar codes on 2x4 Labels (2008/08/12, #92)		
Boxes without box types (2011/02/01, #106)		
ACCOUNTING: Newly Added Files by Date Range (2007/06/14, #82)		

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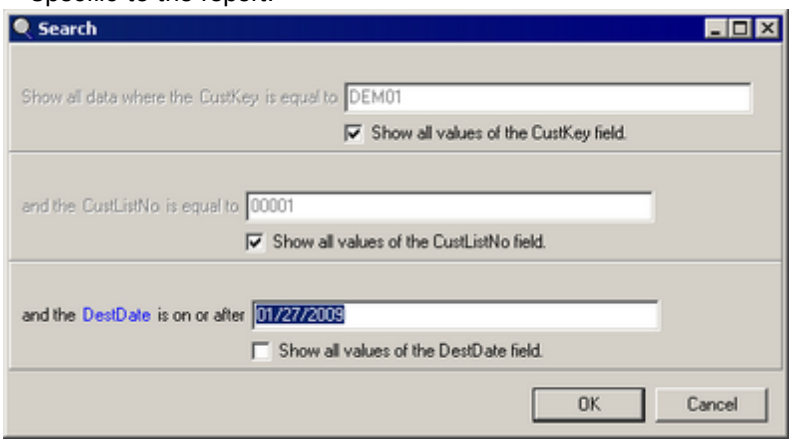
To open a properly-configured report

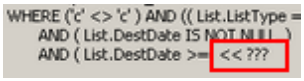
1. Open the **Inventory->Report** module.
2. Click the **Edit** button if you anticipate making changes that you would like to save.
3. **Double-click** on the report that you wish to work with. (You may first need to double-click on the appropriate branch to expand it your report is not visible.) The report opens on the design tab.
4. Click on the design tab.
5. If a search icon appears on the toolbar ( ), clicking it will bring up a list of search criteria that are specific to the report.


Search
Show all data where the CustKey is equal to
DEM01
Show all values of the CustKey field.
and the CustListNo is equal to
00001
Show all values of the CustListNo field.
and the DestDate is on or after
01/27/2009
Show all values of the DestDate field.
OK
Cancel

6. If a field that you wish to search by is greyed out, deselect the **Show all values** check box and fill in the desired value. (Note that text fields are case-sensitive and date fields must be entered in the format that is appropriate to your system.) Click **OK**.
7. If the report is properly configured, the report will appear.

If an error message appears, you may troubleshoot it as follows..

The most common problem results from the fact that reports are run on system with different date formats.



Try to make sense of the error message that appears. In the example above, the position of the '<<???' indicates that there is a problem with the date format in the List.DestDate field.

1. Click **OK** to acknowledge the error message.
2. Click on the **Data** tab.
3. On the query designer window, click on the search icon ( )
4. In the criteria area, modify the date format.
5. Click **OK** to exit the query designer.
6. Return to the preview tab and continue running the report.

Saving changes to a report

- If you are in edit mode, when you close the report window the system will prompt, '*Save Changes?'* . Click **Yes**. to save the report inside EDC RC.
- If you are not in edit mode, when you try to close the window the system will prompt *'The report will not be saved. Close? (the report can be exported)*'. Save export the report before exiting so that you can import it back in when you are in edit mode.

Saving a report definition (or .rtm file) outside EDC RC

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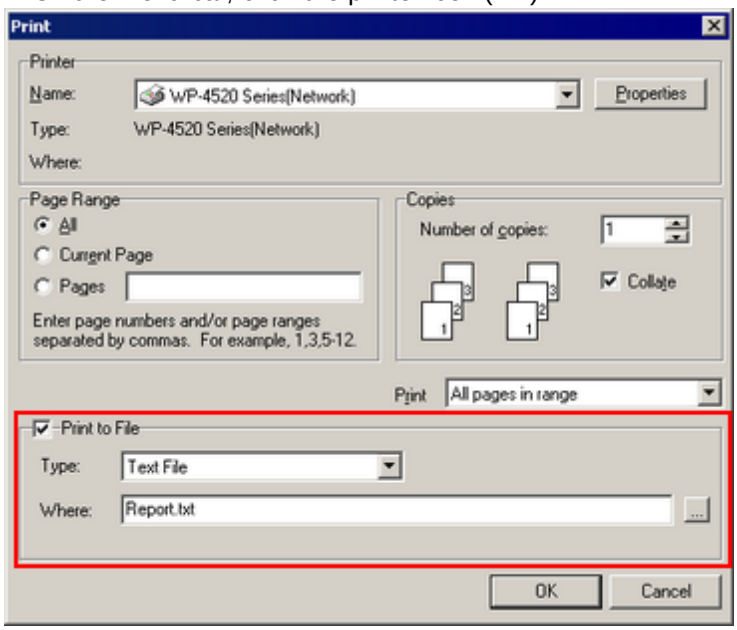
- Ensure that you are on the **Design** tab.
- From the menu, select **File->Export...**.
- Select a name and location for saving the file.

If I will be deleting the document immediately, I typically call the file 'deleteme.rtm'.

Outputting report results to a spreadsheet

1. Run the report using the **Preview** tab.
2. On the menu bar, click the printer icon ( ).



3. If you wish to output data to a file, select the **Print to file** check box.
4. Set the desired file type, name and location.

Note that the file type that gives you the most control for sending data to a spreadsheet is Text File, with the extension '.csv'. This might require set up the first time that you use this.

8.6.4 Organizing your record center's custom reports

The **Inventory->Report (SQL)** module of *EDC RC* provides a powerful tool and flexible tool for obtaining and presenting information from your database. Some of the many uses include:

- Exporting information to spreadsheets (e.g. exporting addresses to use in a GPS tracking software.)
- Printing custom labels for things such microscope slides treated as files.
- Reviewing and analyzing invoicing information
- Printing various certificates related to services such as destruction of items.

Your report module most likely has many reports in place that were created for other record centers but may be useful to you (potentially with some configuration.)

Open the report module

1. Open the **Inventory->Report** (SQL) module.
2. If you wish to make any changes to the reports or how they are organized, click the **Edit** button. It becomes greyed out and the 'OK' button is enabled.

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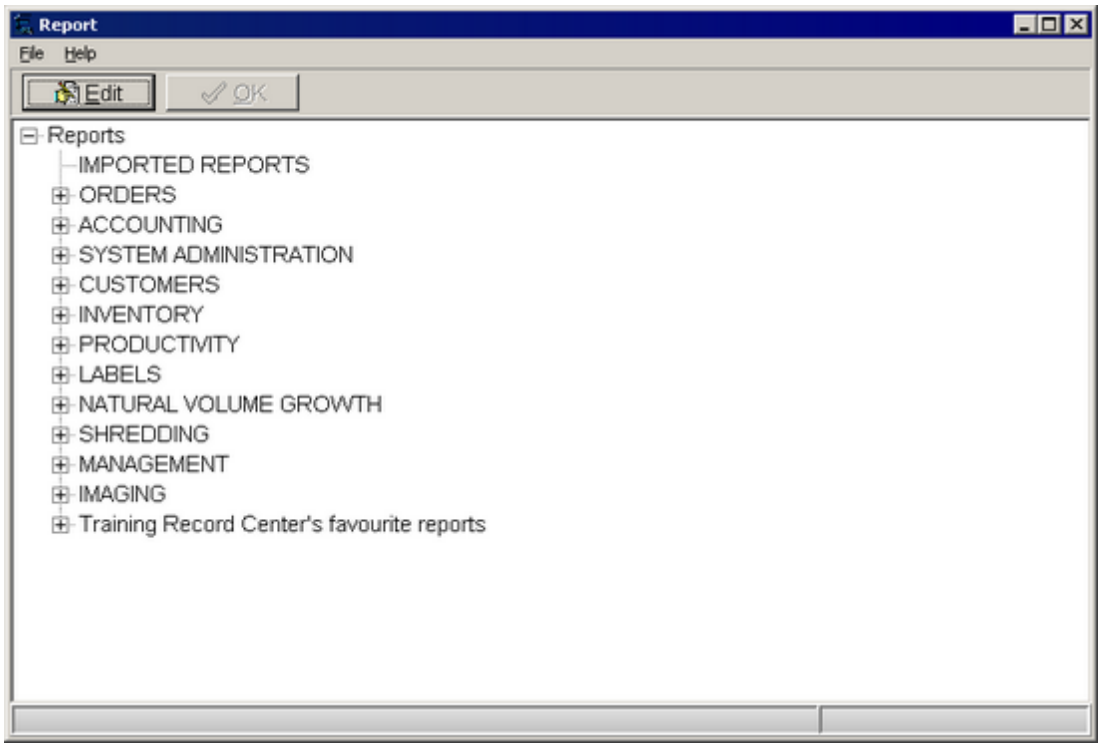
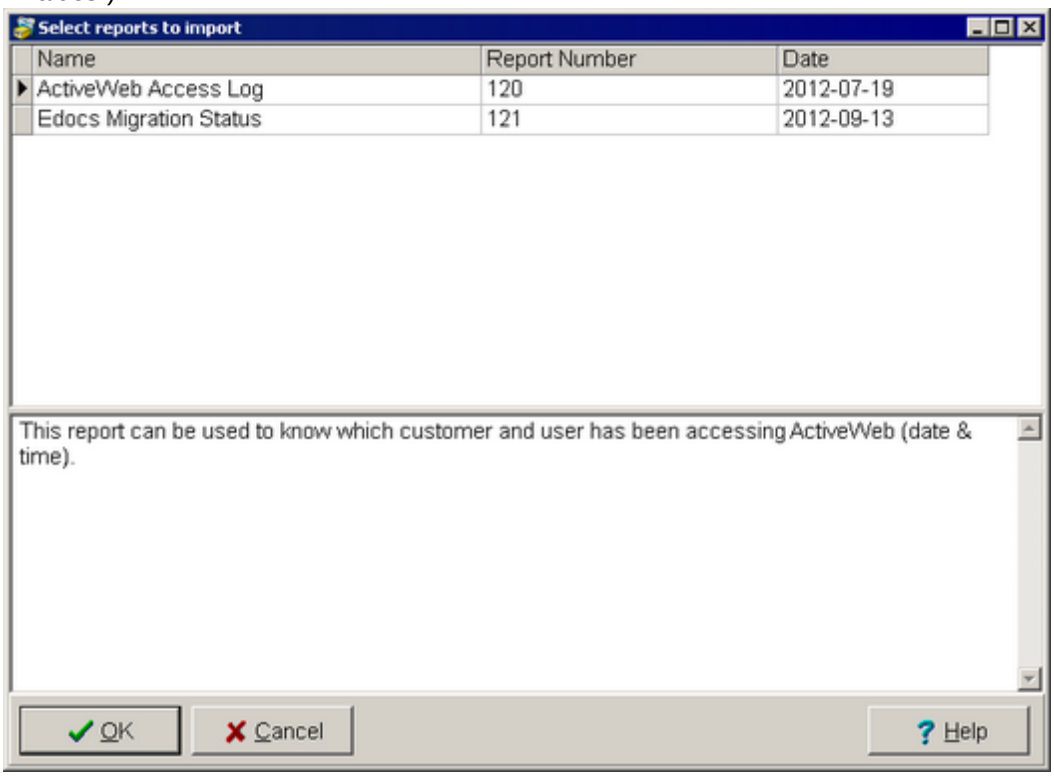


To check for more reports for download from DocuData:

- From the menu, select **File->Import reports**.
- Enter a date range and click **OK**. (Unless you wish to exclude reports, accept the defaults date values.)



- A list of reports appears. The description of the available reports is displayed below. Select the reports that you wish to import by **highlighting them in black**, then click **OK** to complete the import.

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- The reports will most likely appear within the report tree structure, under the *Imported Reports* branch

Organizing your reports and working with the report tree

- **To move a report** to a different branch, drag the report to another branch and drop it.
- **To add a new report or branch**, right-click on the parent object and select **Add child** from the menu and give the new report or branch a name.
- **To rename** an object, **right-click** on it and select **Rename**.
- **To modify who can access** a report or branch of reports, **right-click** and select **Access rights**.

Tips:

- If you wish to sort the reports or branches alphabetically, you may trigger this by renaming one of the items that you want sorted (e.g. by inserting the letter 'a' in front of the word, accepting the change, and then removing it.)
- It may be useful to create a branch or category containing the report that you have used and configured. (E.g. '*Record center's favorite reports*').
- If other people at the record center use reports, you may wish to copy the reports rather than moving them. You can do this as follows:

1. Save the report that you wish to copy as an RTM file,
2. Right-click on your branch and click Add child to add a new blank report to your branch.
3. Follow the instructions above to add a new blank report under your branch
4. If you wish to limit access to your reports, right-click and assign access rights.

See the appendix for a list of commonly-used reports:
List of favorite reports 853

8.6.5 Customizing thermal label templates

Configuring label templates:

- Open the **Management->System Information** module.
- From the menu, select **Edit->Label Templates**.
- Double-click on the desired template.

Template	Usage	
Box	Auto create pre-add boxes** New label on box accession Rebox Batch addition	Standard box label for box types not flagged as being tapes
File		Standard file label
On out card	**Orders->Picking List** module Orders->Order module to reprint	Label that goes on the out card that holds the place that a file is pulled from
On file	**Orders->Picking List** module Orders->Order module to reprint	File picking label. The standard file picking label includes basic file information as well as the recipient, the order date, order number, and possibly the location and box number of the box that the file was pulled from.
Location	**Inventory->Location** module** **Inventory->Shelf Location** module** **Management->Building** module**	EDC RC storage location labels. Note that you may wish to save one label template for printing box location labels, and a template using a smaller label for
Employee	**Management->Employee**	Prints a bar code that employees use to log onto

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	module**	the PDT to track their operations.
Container delivery address	**Orders->Delivery** module	Includes the delivery address but not the recipient name. Manually select how many labels to print, through the delivery module.
Box delivery address	**Orders->Picking List** module	This label includes the delivery address. If *Delivery Labels=Yes* for the account in the customer information module, one label prints automatically for each box ordered when the picking list is created.
Recipient	**Orders->Delivery** module	Includes recipient name and the delivery address. Manually select how many labels to print, through the delivery module.
Alternate label	**Maintenance->Box and File Maintenance**	Rarely used. This prints the specified number of sequential bar codes. The sequence starts at 1 and increases with each new label printed. There is a separate sequence for boxes versus files. The number is padded with zeros to the length of the alternate labels specified in the system information module for boxes or files. If multiple options lengths are set, the longest one is used.
Pallet	**Inventory->Disposal List**, **Transfer List**	Pallet labels are printed as part of the process of picking pallets of boxes for disposal or transfer
Two tapes per row	**Maintenance->Box and File Maintenance**	Prints labels for two different items side by side. This can be used if your thermal printer has tape labels with this configuration
Tape and case	**Maintenance->Box and File Maintenance**	Prints tape labels one per line. (This is what most record centers use.)
Shredding container	**Inventory->Shredding Container**	For labeling shredding containers or console liners. Note that if you need to reprint labels, this is done through the Inventory->Report module.
Transport container	**Inventory->Transport Container** module**	For labeling containers used for transporting files or tapes. Note that if you need to reprint labels, this is done through the Inventory->Report module.

(For tape labels, if If you wish to print tape labels that
(Tape and case to open the editor to the tape label template.
(If you are using small labels that print two tapes per row, select the *Two tapes per row* template.)

To change the label stock (page) size:

- From the menu, select **File->Page setup**.
- Click on the **Paper size** tab.
- Select the appropriate page size and orientation.

Note on changing between portrait and landscape layouts:
If the labels come out of your printer sideways, select landscape, otherwise leave the paper orientation as landscape.

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Note that if you make the page width narrower, you are warned that label elements outside the new page width will be lost. To get around this problem while switching between portrait and landscape orientations,

1. Set both the height and the width of the page to the larger of the two dimensions.
2. Change the orientation setting
3. Set the height and the width to the correct dimension.

Tips on adding and modifying label elements
To modify the layout of labels, you need to be on the design tab. The functions that you will need are accessible through the tool bars.

- To display additional tool bars, from the menu select **View->Toolbars**, and check off the toolbars that you wish to use. If in doubt, display them all.
- If you select a field, the Edit toolbar will indicate either the content of text fields (which you can modify by overwriting what is in the box), or the database field (which you can change, by selecting a different field from the drop-down).

To move a field:
- **Click** on the field so that boxes (or 'handles) appear around its border
- Hold down the **Ctrl** key, and press the **arrow** key in the direction that you wish to move the field

To resize a field:
- **Click** on the field so that boxes (or 'handles) appear around its border
- Hold down the Shift key, and press the **arrow** key to adjust the height or width.

To modify the font:
- **Click** on the field so that boxes (or 'handles) appear around its border
- Use the options on the format toolbar to apply the desired formatting.

Tips on adding images to black and white labels
- Start with an image that is monochrome. Grey-scale and color images badly into black and white. One option is to use Microsoft Paint (which is provided with Windows), and save the image as a monochrome bmp file.
- Use an image that is several times higher resolution than your thermal printer. This helps diagonal and curved edges of the image to come out nicely.

To add an image:
1. On the **standard components** toolbar, click the **image** button.
2. Click on the label approximately where you wish to place the image. A box labeled (Image1) will appear.
3. Right-click on this box to bring up a right-click menu.
- Click '**...**' to **select the image** that you wish to add. Navigate to the image and select it.
- Right-click again select '**Stretch**' and '**Maintain aspect ratio**'.
4. Click on the **Preview tab** to get a sense of how the label might look.

To apply the changes you have made:
1. After making your changes, click the 'x' in the upper right corner of the window to close the label template

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8.6.6 Creating and customizing reports

Once you have opened the report module in Edit mode and either located

8.6.7 Working with box and file reports and lists

Types of reports in EDC

- Built-in reports can be found in most module by going to **File->View->Report**. Most of these cannot be modified. Reports of interest are discussed with the procedures that use them.
- The **Inventory->Report** module enables you to create new reports and customize existing ones using fully customize existing reports and add new ones. Please see Creating and customizing reports 208 for more details.
- The Report Builder functionality also permits you to customize layouts of objects such as Label templates,
- Box and file inventory Built-in box and file reports for which you can modify the fields at the record center or customer level.
- Built-in reports with layouts that can be customized using Report Builder
- Fully-customizable reports built with Report Builder.

built-in box and file reports and lists

The lists that appear when you scroll through the box or file modules or place orders for boxes or files are based on the default record center box and file reports. You can also apply these layouts when creating activity reports. Customer box and file report layouts are accessible to the customer in ActiveWeb. It is also used when producing a spreadsheet of box or file information for a customer as an invoice attachment or through the customer information module, and when producing disposal lists using the built in report.

For record center reports:

1. Open the **Management->System Information** module.
2. From the menu, select **Report->Record Center->Box | File report fields**.

For a customer's reports:

1. Navigate to the correct account in the **Customer->Customer Information** module.
2. From the menu, select **Report->Box | File report fields**.

For default customer reports to create for new accounts

1. Open the **Management->System Information** module.
2. From the menu, select **Report->Customer->Box | File report fields**.

In each case, the following window appears:

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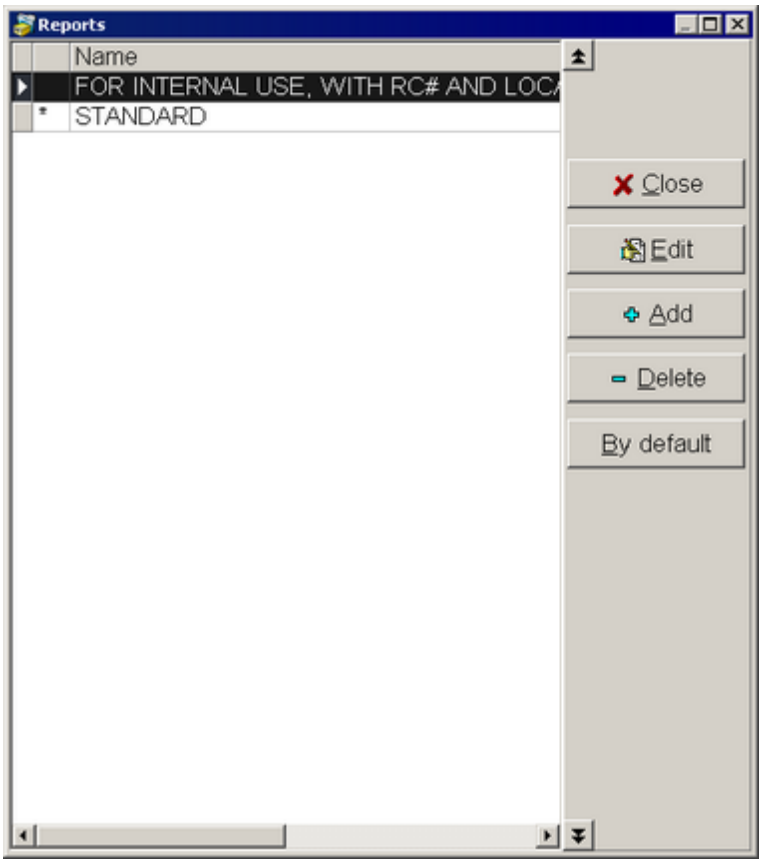

Changing the default report:
The current default field is indicated with an asterisk (*) in the left column. This is the report that is used when placing orders or scrolling the box or file module. If you wish to use a different report for this, do the following:

- Select the desired report. It should be highlighted in black.
- Click the **By default** button. The asterisk should now appear beside the new report.

Adding or editing a report layout:
1. If you wish to edit an existing report, select it and click the **Edit** button. Otherwise, click the **Add** button. The window pictured below appears.

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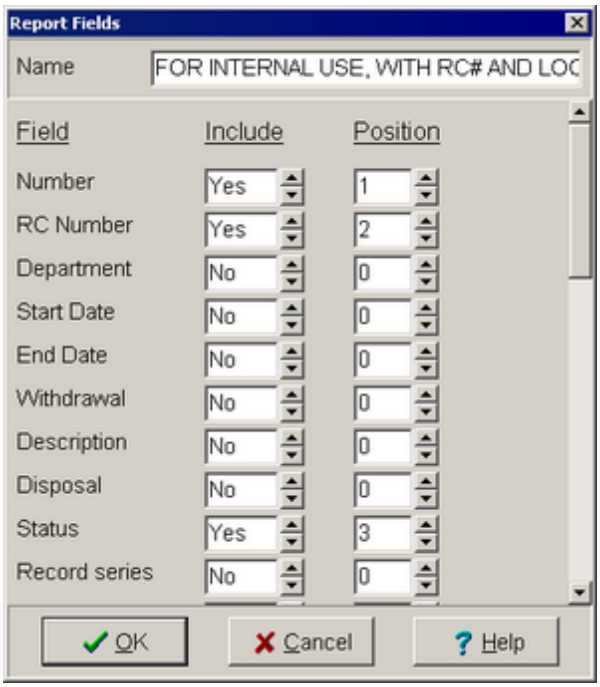

2. Name the report, by typing an appropriate value in the *Name* field.
3. For each field that you wish to include, set the value in the *Include* column to *Yes*. To remove a field, set the *Include* value to *No*.
4. In the *Position* column, alter the column position that the field should occupy if necessary. (Tip: Adding fields to the report in the order that you wish to have them appear makes this step unnecessary, since each newly added field is given the next available column position.)
5. When done, click **OK** to exit the report layout.
6. When done working with reports, click the **Close** button to exit the reports window.

8.7 Management

8.7.1 Recurring tasks

8.7.1.1 Outline (Recurring tasks)

Maintenance is a key operation in the record center; it generally prevents misunderstandings from happening within the record center as well as between the customers and the record center. These few tasks are used to track and deal with common errors performed by employees, such as scanning a box number instead of a delivery slip or entering the wrong number of returning boxes.

8.7.1.2 Daily maintenance tasks

Daily task sheet: this is used to plan or to organize the work that will be done during the day depending on the various deliveries.

Suggested verification frequency: once or twice a day (ex: once in the morning and once in the afternoon if the Record center makes deliveries twice a day).

In the Orders section:

1 In the Delivery Maintenance module, click on **File**->**Daily tasks**

2 A window appears. Select a date and press **OK**.

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3 The report will automatically be created.

Process errors : Error messages that are displayed on screen during delivery processing and moves are also recorded as process errors. Reconciling process errors[673], using the interface available in the **Orders->Delivery Maintenance** module, File->Reconcile allows you to confirm that each error as been addressed. This should be done by the end of each shift, for example by an operations manager.

Not verified returns: this procedure helps to keep track of problems with deliveries, in order to minimize problems with the inventory of boxes and files.

Suggested verification frequency: once a day or three to four times a week (or more).

In the Orders section:
1 In the Return Verification module, click on **File->View|Print not verified returns**
2 Select a date range
3 The report will automatically be created or printed

In this case, there are four possibilities for returns not being verified : the delivery has only been created; the delivery was closed but not delivered; the delivery was delivered but not returned; or the delivery was returned but not verified. One should look at every delivery to find possible errors or problems, but it is easier to concentrate on the deliveries that have been returned to save time.

5 After all the unverified returns are looked at, go in the Return Verification module
6 Do a manual verification of all deliveries (see Manually verifying returns[659])

Not verified items: this procedure helps to keep track of problems with deliveries, in order to minimize problems with the inventory of boxes and files.

Suggested verification frequency: once a day or three to four times a week (or more).

In the Orders section:
1 In the Return Verification module, click on **File->View|Print not verified items**
2 The report will automatically be created or printed
3 Refile the items (with the PDT[182] or with a printed refile list)

Ex: An item has been returned to the record center, it was scanned in the Return Delivery module and was put in a transit location. The item was refilled, but the location in which it was put was marked as full in the software, so an error is shown in the report. The item should be located, and refilled properly (see Correcting move errors[184]).

***Orders not closed:** this procedure helps to keep track of the deliveries during the day and to reduce the amount of problems an undelivered delivery could create.

Suggested verification frequency: once or twice a day (ex: once in the morning and once in the afternoon).

In the Orders section:
1 In the Orders module, click on **File -> View|Print Orders -> Orders not closed**
2 The report will automatically be created or printed.
3 Pick the items manually (or with the PDT[170]) and deliver the items to the customer manually (or with PDT[175]).

Deliveries not delivered: this is used to keep track of deliveries (this procedure is important since an

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undelivered delivery can cause misunderstandings with the customer whose items have not been delivered.)

Suggested verification frequency: once a day or three to four times a week (or more), usually at the end of the day.

In the Orders section:
1 In the Delivery Maintenance module, click on **File** -> **View|Print report -> Deliveries not delivered**
2 The report will automatically be created or printed.
3 Manually check the different deliveries by going in the Delivery Verification module to see the state of each delivery and define the problem.
4 When the problem has been solved, go in the Delivery Maintenance module -> **File** -> **Set delivery delivered**
5 Enter the delivery number and press **OK**.
6 The undelivered delivery will be set as delivered.

Items not delivered : this is used to keep track of problems with items within deliveries (this procedure is very important since undelivered item(s) can cause misunderstandings with the customer whose item(s) have not been delivered.)

Suggested verification frequency: once a day or three to four times a week (or more).

1 Go in the Orders section -> In the Delivery Maintenance module
2 Click on **File** -> **View|Print report -> Items not delivered**
3 The report will automatically be created or printed.
4 Manually check the different deliveries by going in the Delivery Verification module to view the item within the delivery and define the problem.
5 When the problem has been solved, go in the Delivery Maintenance module -> **File** -> **Set delivery delivered**
6 All the undelivered items of the delivery will be set as delivered.

Ex: A driver forgot to deliver an item, but did not mention it on the delivery slip. There will be an error when the delivery is downloaded from the PDT to the system; the item will be marked as "not delivered".

8.7.1.3 Monthly maintenance tasks

Box, File and Location verification: this type of maintenance is normally used to verify if the importation of data went well, or if the Box and File maintenance module is used a lot, or if boxes, files or locations are often edited manually.

Suggested verification frequency: once every three weeks or every month.

Verify boxes:
In the Maintenance section:
1 In the Box and File verification module, click on **File -> Verify boxes**
2 A confirmation message for printing appears: "Print report?", press Yes to print and No or Cancel if you do not want the report to be printed.
3 A message appears: "For customer?"
4 Press Yes to choose a customer. Enter the customer key in the field and press **OK** or press **OK** to have the list of customers, select a customer (it will appear highlighted) and press **OK**.

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5 Press No or Cancel to have the report for all customers. A window appears.
6 Specify the fields you want to verify by checking the check boxes beside each field you desire. Press **OK**.
7 The report will automatically be created and/or printed according to the previous choices.
8 Correct the different mistakes by going in the Inventory section in the Box module. Select the box you want to edit, click on **Edit -> Edit** and correct the mistake(s) manually. Press on the **Accept** button when all the modifications have been made.

Verify files:
In the Maintenance section:
1 In the Box and File verification module, click on **File -> Verify files**
2 A confirmation message for printing appears: "Print report?", press Yes to print and No or Cancel if you do not want the report to be printed.
3 A message appears: "For customer?"
4 Press Yes to choose a customer. Enter a customer key in the field and press **OK** or press **OK** to have the list of customers, select a customer (it will appear highlighted) and press **OK**.
5 Press No or Cancel to have the report for all customers. A window appears.
6 Specify the fields you want to verify by checking the check boxes beside each field you desire. Press **OK**.
7 The report will automatically be created and/or printed.
8 Correct the different mistakes by going in the Inventory section in the File module. Select the file you want to edit, click on **Edit -> Edit** and correct the mistake(s) manually. Press on the **Accept** button when all the modifications have been made.

Verify locations:
In the Maintenance section:
1 In the Box and File verification module, click on **File -> Verify locations**
2 A confirmation message for printing appears: "Print report?", press Yes to print and No or Cancel if you do not want the report to be printed.
3 The report will automatically be created and/or printed.
4 Verify the locations manually to make sure that the report is correct. Correct the mistakes manually by going in the Inventory section: in the Locations module click on **Edit->Edit** and perform the changes. Press the **Accept** button.
5 Go in the Rebuild Space Usage module and rebuild the space usage[401].

8.7.1.4 Accounting tasks

Once every week/two weeks

Preview invoices : This is done to make sure that some mistakes have not already been made or to report to the customer the approximate cost of the services given for a certain period of time.

In the Accounting section:
1 In the Invoicing module, click on **File->Preview invoice**
2 Enter the customer key or press **OK** to have the list of customers (select a customer in the list and it will appear highlighted) and press **OK**.
3 Enter the invoice date in the field.
4 Select what type of invoice you want (Rent and Service | Service only | Rent only)
5 Enter a date range for the "Service from" and "Rent from" fields.
6 When all the information has been entered, press **OK**.
7 A preview will automatically be created.

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Preview invoice totals : This is often done to preview the approximate revenue of the record center at the end of the month. One should run the Invalid courier quantities report before previewing the invoice totals, since it has an impact on the accuracy of the report.

In the Accounting section:
1 In the Invoicing module, click on **File->Preview invoice totals**
2 Select a building from the list (it will appear highlighted) and press **OK**.
3 The report will automatically be created.

Once every week/two weeks and before billing

Invalid courier quantities: This is done to make sure that mistakes have not slipped in right before billing. It is also to make sure that customers are billed correctly. This only applies to customers that a billed using the Container courier billing method, without the automatic container option turned on.

Before billing

View excluded from selection : This is a list of customers for which the invoicing must be done manually.

In the Accounting section:
1 In the Invoicing module, click on **Create->View|Print excluded from selection**.
2 The report will automatically be created.

View unbilled customers : This is done to know which clients you want to bill and if you must bill them (this is mostly a way to plan out your invoicing, and to know what is ahead of you in the following months.)

In the Accounting section:
1 In the Invoicing module, click on **Create->View|Print unbilled customers**.
2 Select an invoice date.
3 The report will automatically be created.

After billing

View unbilled customers : This is done to make sure that you have billed all the clients you needed to bill.

In the Accounting section:
1 In the Invoicing module, click on **Create->View|Print unbilled customers**.
2 Select an invoice date.
3 The report will automatically be created.

Verify that E-mailed invoices went through: Invoices sent will be copied to the Invoice email BCC address[374], and any delivery failure notices will be sent to the Invoice email Reply to address[374]. Check for messages at both of these e-mail addresses.

8.8 Working with rcMobile

8.8.1 Overview of rcMobile

rcMobile permits you to perform certain operations "live" in your database using mobile devices, without the need to place the need to manually upload or download lists. When you do not have a data

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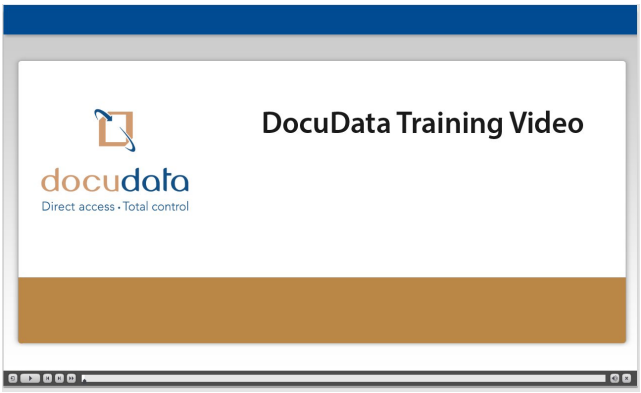
connection (for example, if you are deep inside your warehouse or you are performing deliveries in an area that does not have data coverage), rcMobile stores the results of operations. When your connection is re-established, this data is automatically synchronized.

Overview of work-flow:

- **Orders** are placed in the usual ways, e.g. via ActiveWeb, recurring orders or rotation schedules, or placed directly in EDCRC.
- **Picking** occurs in the usual ways, e.g. using the PDT, or using paper picking lists and the manual picking process.
- **Packaging** of items for delivery, such as files or tapes, may start as soon as items for delivery have been picked. Boxes do not require packaging. Packaging filed and tapes in advance with rcMobile makes it easier to perform truck validation and get your trucks on the road more quickly.
- **Delivery creation** and **Delivery Route Preparation** are performed in EDCRC and usually start once picking for that delivery cycle is completed.
- **Truck Validation** is typically performed by drivers while loading trucks, to ensure that all items for delivery are present and loaded onto the correct trucks.
- **Delivery (and pick-up) with rcMobile** happens at the customer site. If a data connection is available, this information is recorded and confirmed live in EDCRC as it happens. If a data connection is not available then the data will synchronize as soon as a data connection does become available to rcMobile. Items picked up at the client site are considered *in transit*.
- The **Unloading** process tells EDCRC that the items that were picked up at client sites are now In at the record center and can be ordered by the client if necessary.
- **Staging/Sizing** of incoming items is performed in the usual way using the PDT.
- Items are **Shelved** or **Refiled** in the usual way, using the PDT.
- **Deliveries** and **process errors** are reconciled in the usual way.

Before you can use rcMobile, it must be deployed as a web application 135. If you are accessing rcMobile on a computer, most modern browsers that support HTML5 will work. If you are accessing rcMobile over a mobile device, some browsers work better with scanning devices than others do. You may wish to contact support@docudatasoft.com for recommendations.



8.8.2 Logging on to rcMobile

Logging on to rcMobile

1. Open your web browser and navigate to your rcMobile web application. You will most likely do this using a saved shortcut.

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2. Enter your employee **Log in name** and **password**, then press Enter or click the **Enter button**. This will bring you to the home screen of rcMobile.

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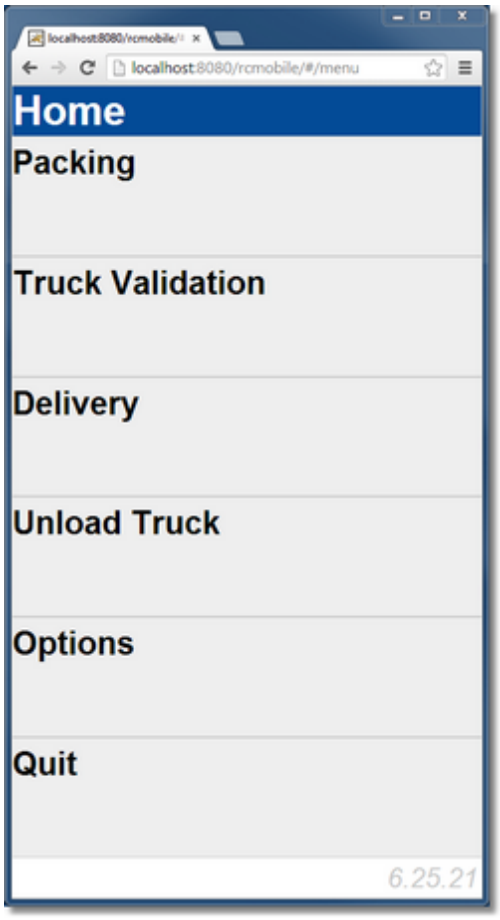

Selecting a printer for printing delivery slips through rcMobile

- In rcMobile, ensure that you are on the home screen. (Click the home button if necessary)

- From the main window, Click **Options->Printers**, and select from the printers available to your device.

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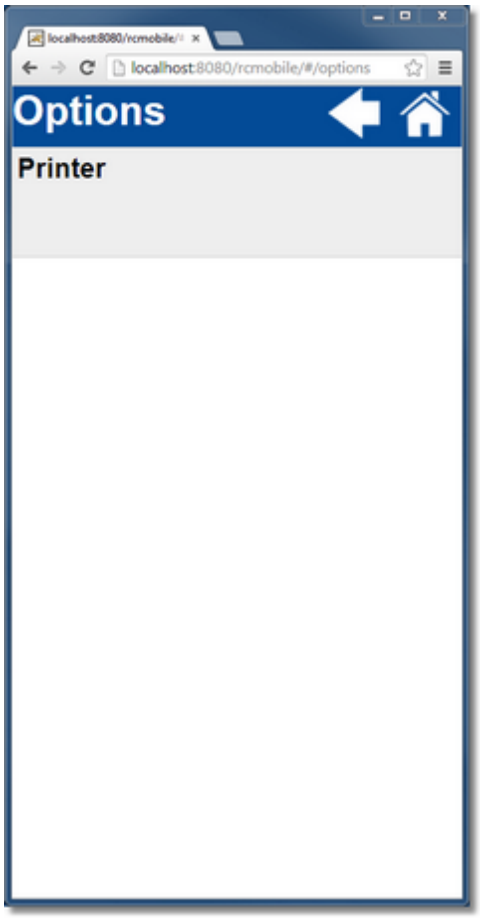

8.8.3 Packaging files and tapes with rcMobile

Packaging

Packaging consists of scanning the files and tapes of a delivery to a transport container. This is typically done by warehouse staff. This relieves time pressure from your drivers because they can perform truck validation and deliveries by scanning the transport container bar codes rather than scanning individual items. Once a delivery is created and closed, it will appear in rcMobile for packaging.

- Log into rcMobile, as described above.
- From the Home screen, click on **Packaging**. The packaging screen will appear, defaulting to the Waiting tab.
- From the waiting tab, scan or **select the delivery** to package.

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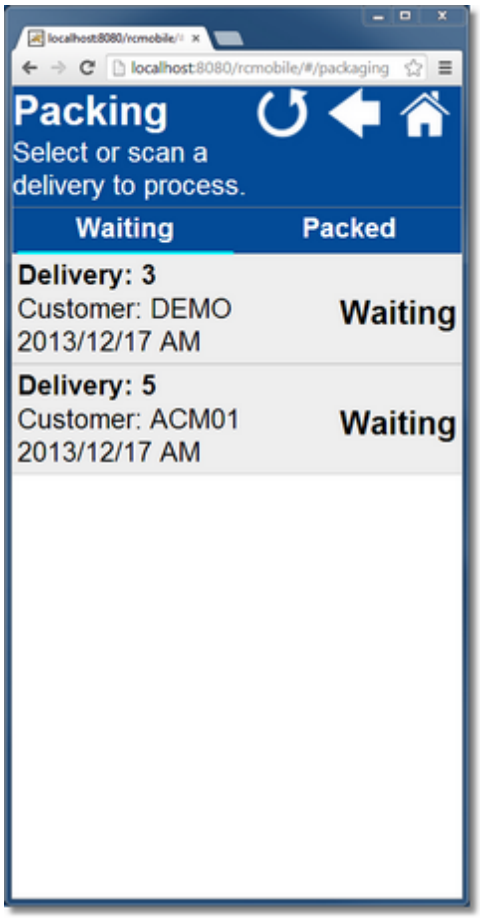

- The packaging screen displays the delivery number, and the list of items requiring packaging for the delivery. It prompts you, "*Scan a transport container then scan the items to add to it. Scan the container again to close it*."

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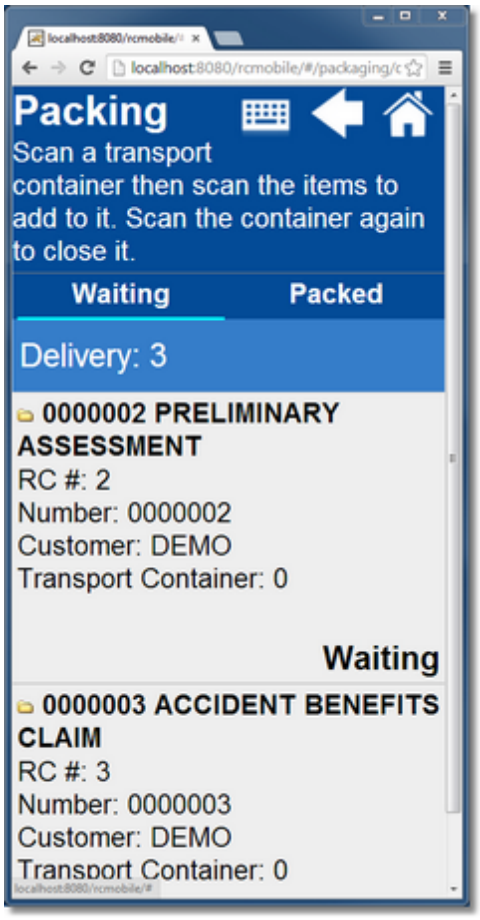

- Take a transport container and **scan** its label. The screen is updated, indicating the transport container that you are working with. Scan items as you place them in the container.

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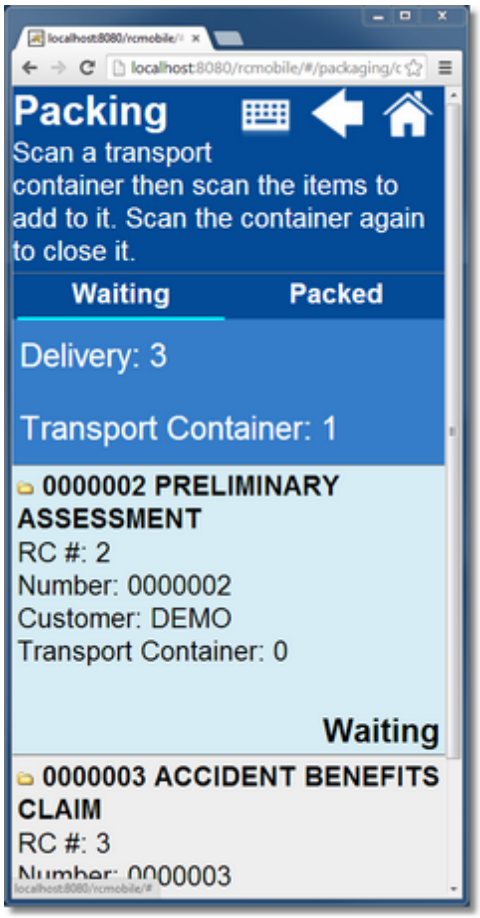

- As you **scan items** to transport containers, they will disappear from the "*Waiting*" list and appear in the "*Packed*" list.
- Once the last item requiring packing for a delivery is scanned to a transport container, rcMobile returns you to the delivery list, where you may continue by packaging the next delivery.
- If you wish to work with a delivery that is packaged, click on the Packed tab. From here you can print the delivery slip (You must initially select the printer to use, under "*Options*" on the home tab, or select a packed delivery and view or modify which transport container an item is assigned to.

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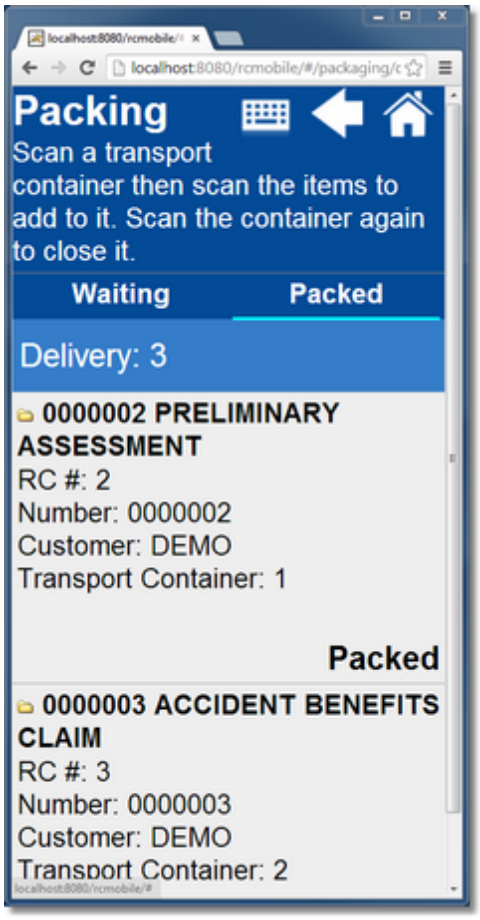

Notes:

- If you wish to switch to another container for the same delivery, scan the current transport container to close it, then scan the next transport container to open it.
- If an item that was previously scanned to one container is scanned to a new container, it will be moved to the second container.

8.8.4 Truck Validation with rcMobile

Printing delivery slips for a packed delivery

- Navigate to the **Packing** screen of rcMobile, which is available from the Home screen.
- Under packing, select **Packed**, to view the deliveries for which packing has been completed.

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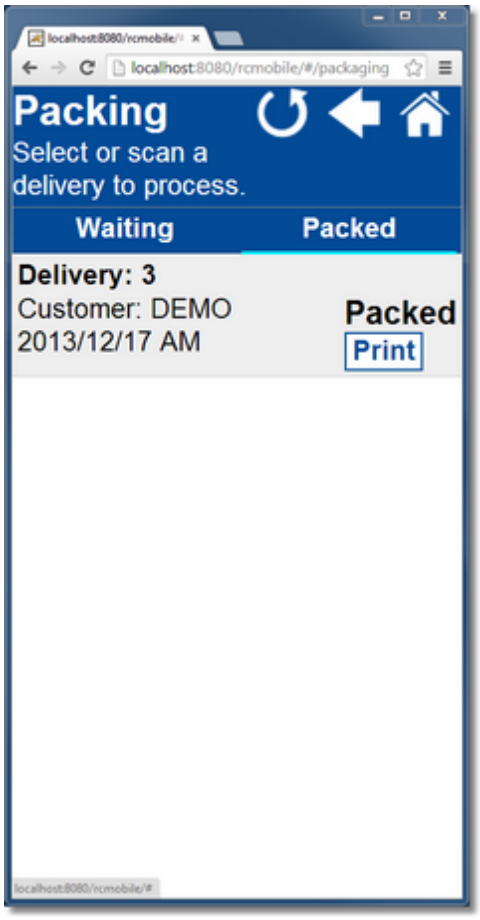

- Click the Print button to send the delivery slips to the default printer selected for rcMobile on your device.

Performing truck validation with rcMobile

Truck validation is how your drivers ensure that they have all of the correct items for performing their delivery route. Prior to truck validation, deliveries must be assigned to delivery routes, all deliveries on the route must closed and packed.

Warning: as of version 6.25, line items do not appear in rcMobile and should be manually confirmed by the driver.

- From the home screen, select **Truck Validation**.
- From the **Waiting** tab, please **select your route**.

(If your route does not appear, verify no deliveries on it are still in the Created state or are waiting for packaging to be completed.)

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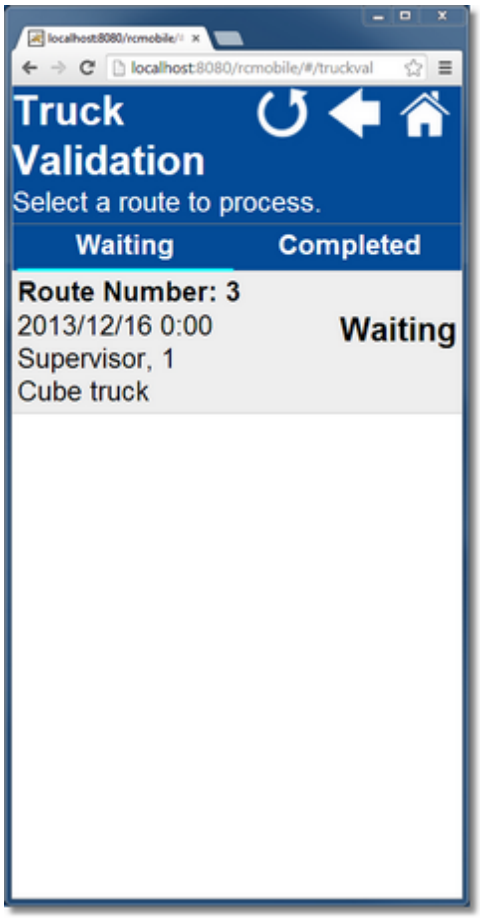

- Next, you will be prompted to "Scan or select a delivery to process", followed by the list of deliveries that have not yet been completely truck validated for that route. **Scan or select a delivery**.

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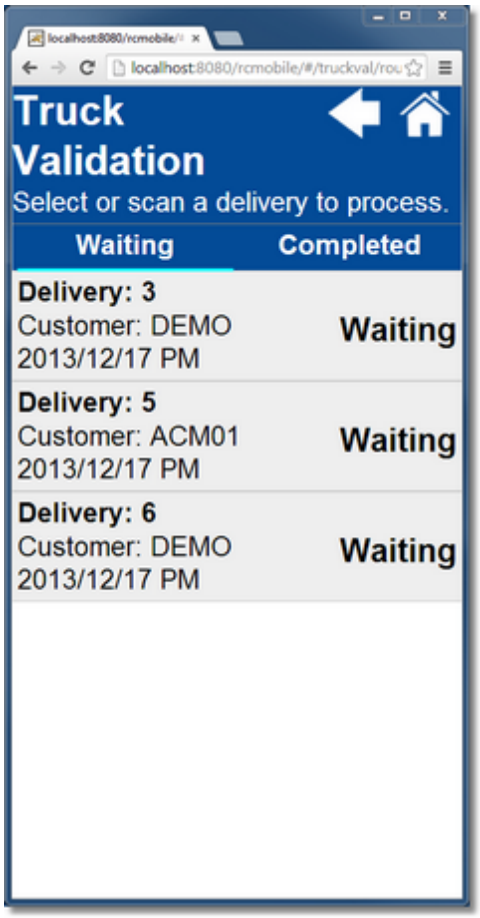

- The boxes and transport containers requiring truck validation for the delivery are displayed. **Scan the listed items**. They will be moved to the *Completed* tab as they are scanned.

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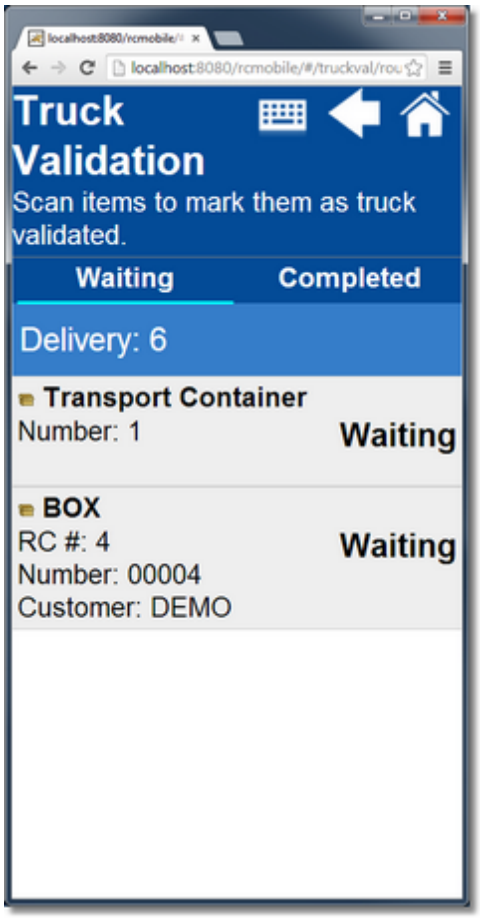

- Once the last item for the delivery is scanned, you will be returned to the list of deliveries for Truck Validation, where you may select the next delivery to truck validate.
- Once the last delivery for the route is validated, you will be returned to the main window and may proceed to perform the delivery.

***** Shredding bins appear as a summary report.**

8.8.5 Performing deliveries with rcMobile

Performing deliveries with rcMobile

Once truck validation for a route is completed, the route appears as *Waiting* in the list of deliveries.

- From the home screen, select **Delivery**. rcMobile prompts you to select a route to process.

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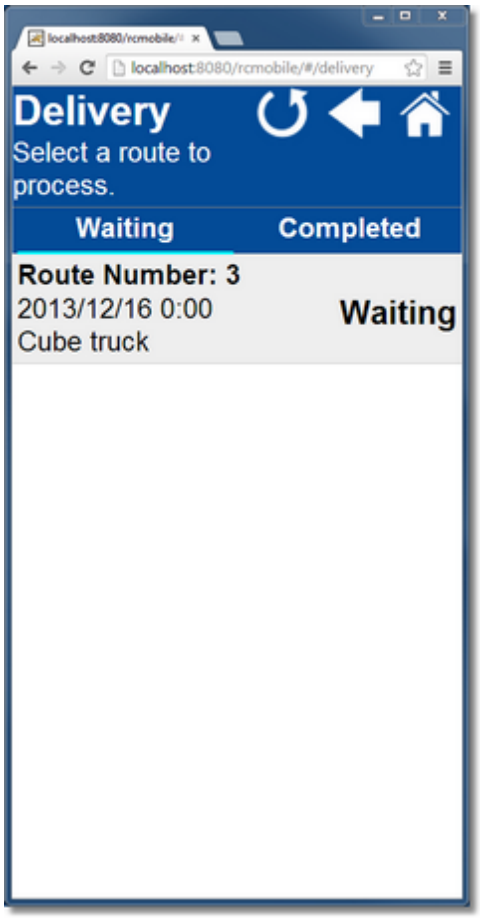

- From the **Waiting** tab, please **select your route**. rcMobile presents the list of deliveries waiting to be processed for that route and prompts you to *select or scan* one to process.

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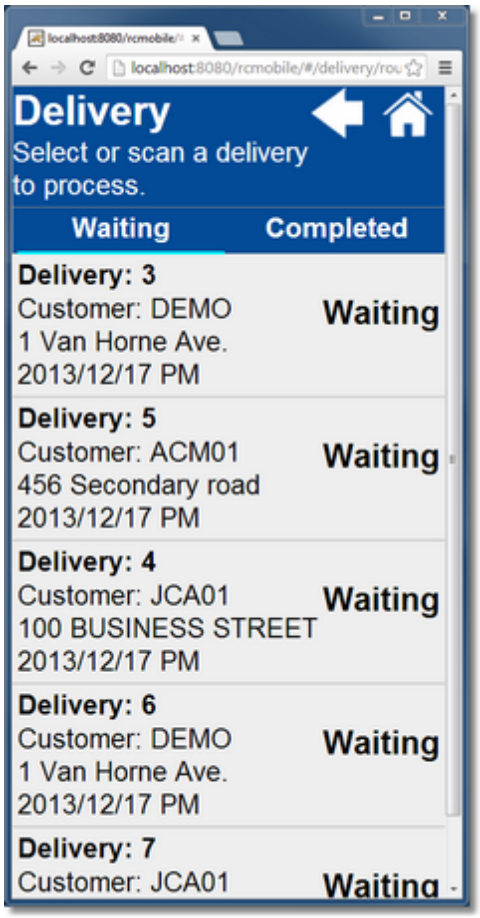

- Once you select a delivery, rcMobile prompts you to select one of the following operations:

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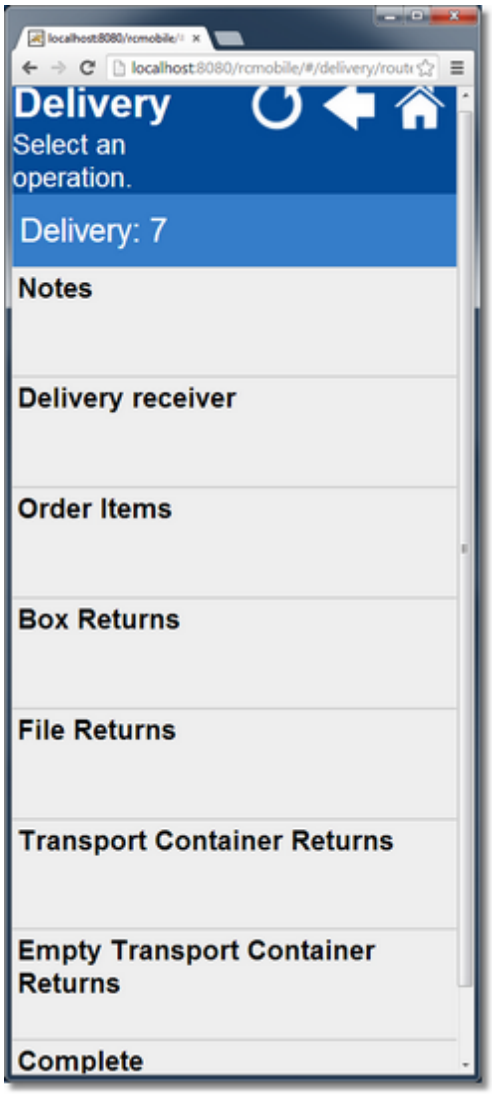

- **Notes:** Select this option to display notes associated to this delivery address.
- **Delivery receiver:** Select this option to select the delivery receiver from a list. This list is taken from the list of Authorized users in EDCRC which are identified as delivery receivers. If none are specified for the account then it is not necessary to specify a receiver. If the user has pin codes specified, then the driver should pass the rcMobile device to the recipient so that they can enter their pin.
- **Order items:** Once the receiver is confirmed, the driver releases the order items to the customer by clicking on the Order items operation and then scanning the items to mark them as delivered.
- **Box returns:** Scan boxes to mark them as returned. Item that were specified in advance for pick-up appear as waiting. Their state changes to completed as they are scanned.

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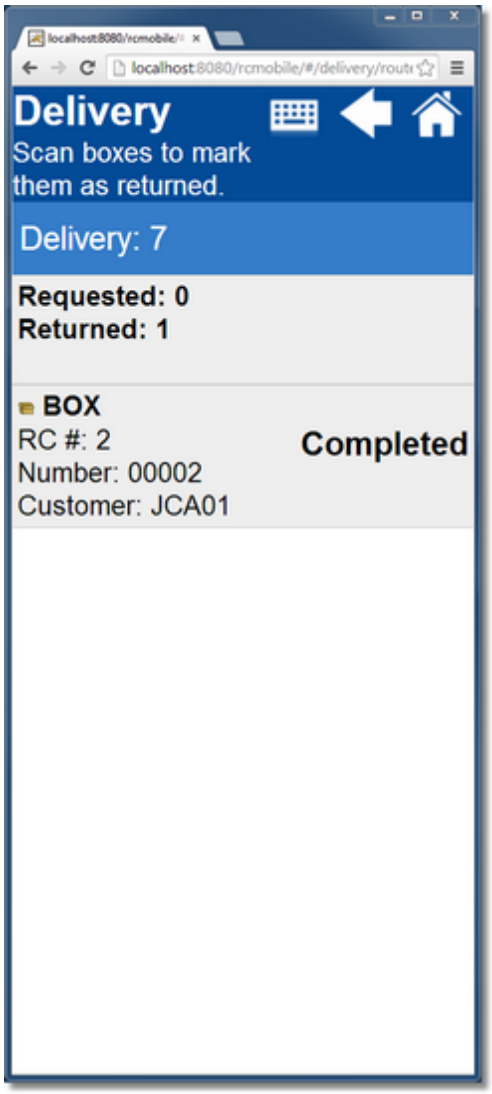

If the client requested an itemized return of specific boxes, files, or tapes, then the number of requested items is displayed and the details of the items are listed below, with a status of "Waiting". As the items are scanned, the items are marked as "Completed", and the Returned quantity increases.

- **File returns:** Scan files to mark them as returned.
- **Transport containers returns:** Scan files to mark them as returned.
- **Empty transport container returns:** Scan files to mark them as returned.
- **Complete:** Select this option once the delivery is complete. A summary of the return is provided. If there are any discrepancies with itemized returns requested then ***. Click the confirm button. If the authorized user

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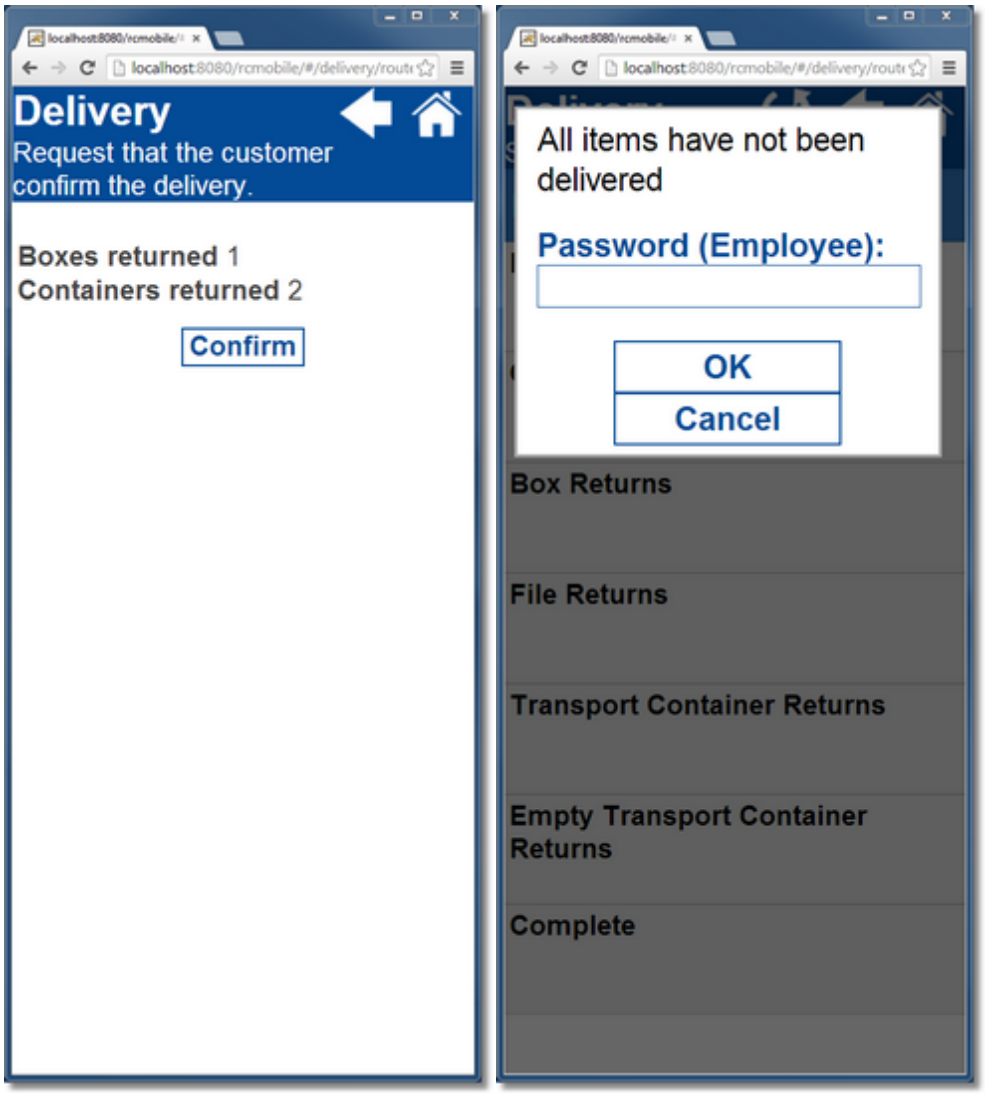
- 

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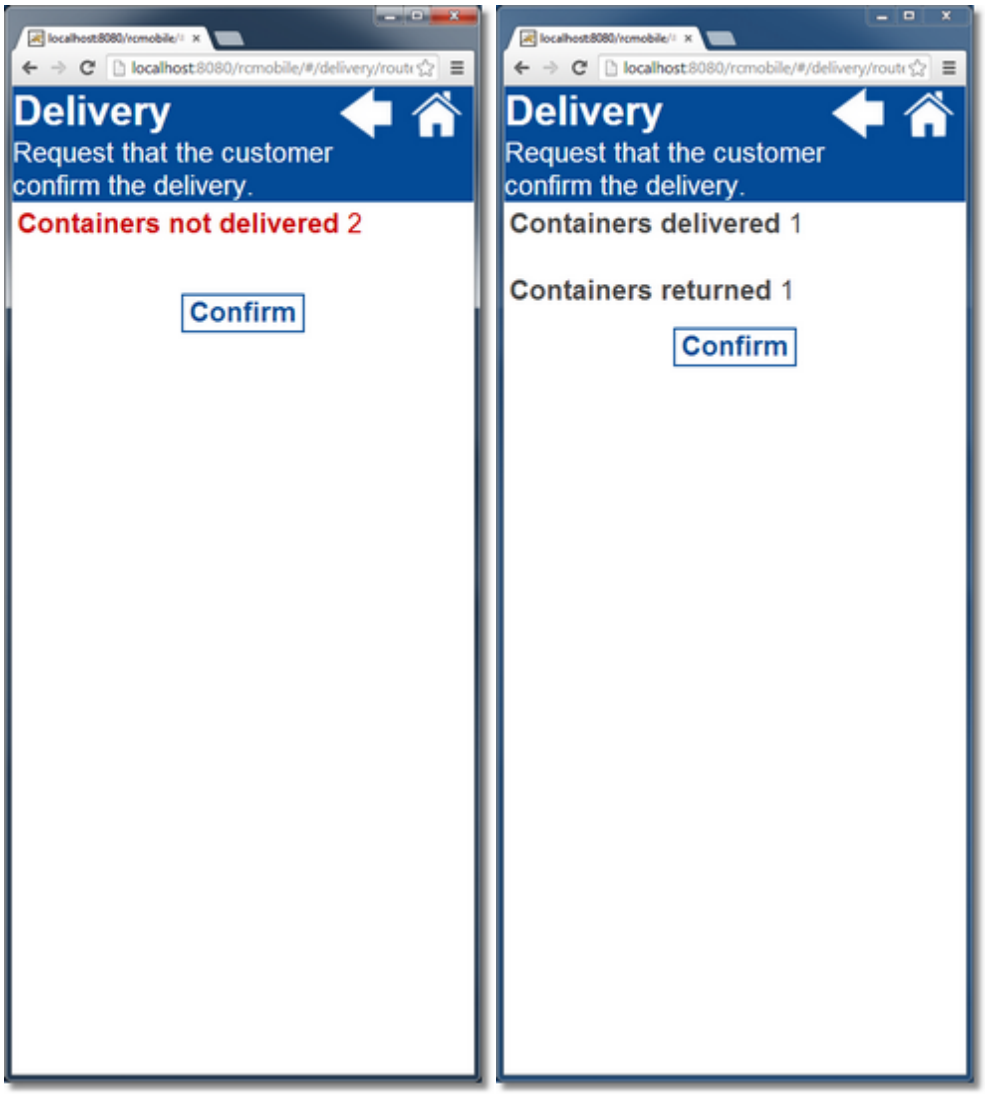

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8.8.6 Unloading a delivery vehicle with rcMobile

Unloading the truck

Unloading the truck marks the returning items as In, so that they can go back out on an order if necessary.

- From the home screen, select **Unload Truck**.
- Select the vehicle to unload.
- Scan a transit location bar code.
- Click Confirm to complete the operation.

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9 Software reference manual

9.1 The main window

9.1.1 Overview (Main Window)

The Main window is the most general window in EDC, and contains the various modules. This window also has menu options

Window elements:

- Customer tab:Modules associated with customer management 235
- Management tab: Modules associated with record center management 236
- Maintenance tab: Modules associated with maintenance 237
- Inventory tab: Modules associated with inventory management 238
- Orders tab: Modules associated with orders 240
- Accounting tab: Modules associated with accounting 242
- Opened modules

Menu options:

File menu

- Thermal label options 243
- Simple interface 243
- Active web sessions 244
- Exit 243

Help menu

- Contents 244
- Change language 245
- View error log 245
- About 245
- Who am I? 245
- Resources 245

Main window:

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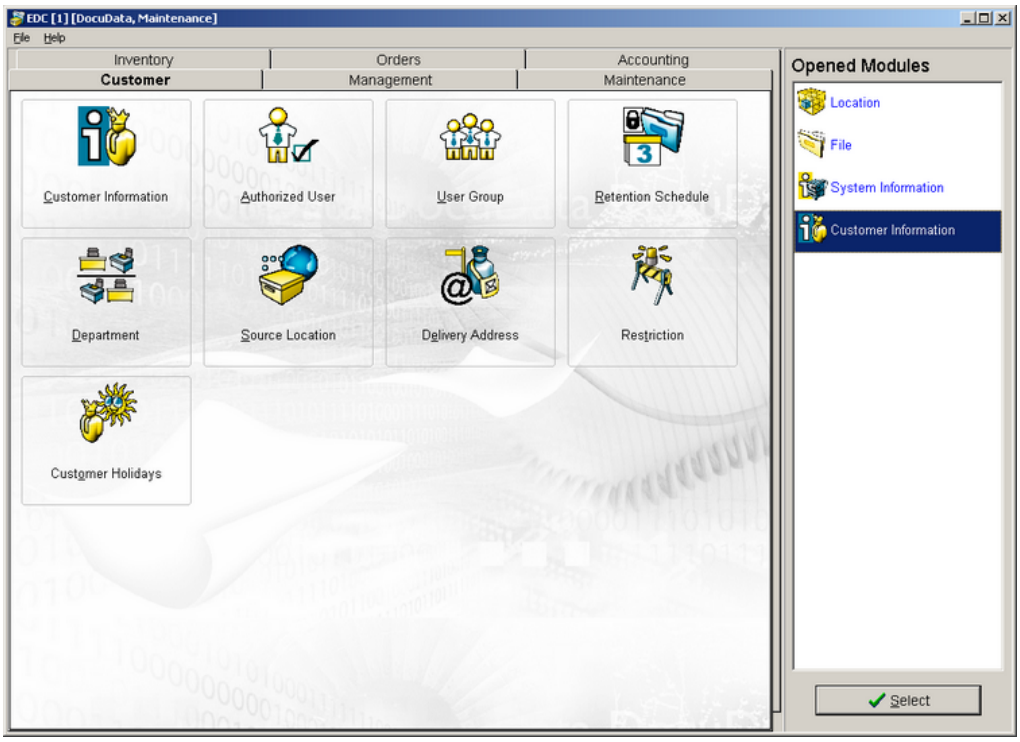

9.1.2 Modules associated with customer management

The Customer tab contains the modules to configure most customer-specific parameters, with the exception of customer pricing.

Customer Information[246] **module**

Configure most parameters for a customer. It is possible to override many default parameters established in the system information module, including record center business hours and picking times.

Authorized User[303] **module**

Manage access parameters of customer's authorized users.

User Group[312] **module**

Manage the access parameters for roles that can be assigned to authorized user.

Retention Schedule[315] **module**

Create and manage record series for a customer. If a customer's retention policy is based on document type, parameters in this module determine when and how a document is eligible for disposal.

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Department [322] **module**

Manage departments and sub-departments for each customer. Each document must have a department and sub-department. Department can be used in calculating billing, calculating retention, and restricting access to information by authorized users.

Source Location [328] **module**

Manage the list of the source locations that a customer can assign to a box.

Delivery Address [329] **module**

Manage one or more delivery addresses per customer.

Restriction [333] **module**

Manage restrictions to prevent inclusion of a specified record series on disposal lists though their disposal dates have past. This is typically used in the case of an audit.

Customer Holidays [335] **module**

Specify customer holidays, to prevent delivery attempts on these days.

9.1.3 Modules associated with record center management

The Management tab contains modules that relate to the management of the record center as a whole.

Employee [338] **module**

Configure the behavior of the system for each record center employee, including their access rights.

Employee Group [344] **module**

Define the module access required for different roles in the record center. Assigning a role (employee group) to an employee grants them all of the specified access rights, thereby speeding up the management of employee access rights.

Delivery Vehicle [348] **module**

Create a list of delivery vehicles available. These are used in the Delivery Route module.

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Business Type[350] **module**

Create a list of customer business types. These are applied in the customer information module, and can be used in various reports for analyzing patterns by business type for strategic purposes.

Holiday[351] **module**

Specify record center holidays, so that deliveries are not scheduled for these dates. When serving tape rotation clients, it is necessary to enter holidays for at least as far in advance as customers schedule their tape rotations. (egg. 5 years)

Building[353] **module**

Configure building-specific parameters for the buildings used for storage by your record center.

Dictionary[360] **module**

Modify the terminology used by the record center in EDC, and for customers on ActiveWeb. The system supports two languages. The default dictionary is English and French.

Access Log[362] **module**

View intervals of access to the system by employees through EDC RC and by customers through ActiveFile. Terminate active sessions if necessary.

System Information[364] **module**

Configure parameters that apply to the whole system (egg: the date format, and the picking hours for orders.)

Customer Export[388] **module**

Extract data for a customer, typically for setting the customer up with ActiveFile software.

Customer Purge[391] **module**

Permanently remove inventory data for a customer from the main database. (This is rarely used)

9.1.4 Modules associated with maintenance

The maintenance tab contains modules used for maintaining smooth operations at the record center. They are grouped separately for security reasons, as some of these functions bypass the procedures

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and safety features built into EDC.

Box and File Verification[393] **module**

Verify the integrity certain fields in the database. For example, re-calculate the number of boxes in each location to see if it matches what is reported.

Department Transfer[397] **module**

Transfer the records of an entire department or sub-department to another department or sub-department of the same customer.

Rebuild Space Usage[401] **module**

Update the number of boxes in each location, or systematically re-scan your inventory.

Remove PRE ADD[410] **module**

Remove one, multiple, or all records of documents in PRE ADD from the database for a customer.

Box and File Maintenance[414] **module**

Perform various powerful maintenance tasks on the records of boxes or files. Access to this module should be carefully limited, as this module enables users to bypass some of EDC's processes in ways that may affect the accuracy of many records.

9.1.5 Modules associated with inventory management

Modules on the inventory tab support the management of a record center's inventory.

Box[445] **module**

Create, consult, and manage records of box information, including notes. Print reports and labels, and view a list of inventoried files in the box.

File[445] **module**

Create, consult, and manage records of file information. Print reports and labels, and access images associated with the files.

Search[485] **module**

Locate box and file records using various combinations of criteria.

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Rotation Schedule[493] **module**

Schedule delivery dates for specific items, typically data storage tapes.

Full text search[497] **module**

Find box and file records containing specific words.

Report[501] **module**

View, modify, and create customized reports.

Location[513] **module**

Manage the locations used to store boxes at your off-site record center.

Shelf Location[524] **module**

Manage locations used to store files on open shelves at your off-site record center.

Activity Report[531] **module**

Consult or print reports of specified activity types over a specified date range, and print of overdue memos for boxes or files OUT to users.

Disposal List[536] **module**

Manage the disposal of boxes (destruction, revision, send to depot, etc), according to the demand of the customer, following a rigorous procedure to protect against error.

Transfer List[552] **module**

Transfer documents from the inventory of your off-site record center to an external site.

Deletion List[565] **module**

Cancel future storage charges for boxes that a customer indicates will not return, marking them as DELETED. Files may also be deleted. It is possible to reactivate deleted items.

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Internal Transfer Lists[571] **module**

Move items systematically from one area to another within your record center, for example while renovating or reorganizing.

Internal Note[579] **module**

Record and consult notes about boxes and files for record center use. These are not visible to the customer.

Shredding Container[580] **module**

View the history of containers. Manage container types and pricing for emptying and container rotation services.

Transport Container[584] **module**

Label and track containers for packaging and delivery files and tapes.

9.1.6 Modules associated with orders

Modules on the Orders tab permit and support the circulation of documents between the customer and the record center.

Orders[588] **module**

Place new orders and consult details about existing ones, including their status, items, recipient, and requested delivery date, type, and address.

Picking List[620] **module**

Process picking lists for items on regular orders, for a specified delivery date or order number.

Delivery Creation[625] **module**

Create deliveries. If the Order Grouping[259] option for a customer is set to YES, multiple orders delivered to the same address at the same time with compatible delivery types will be grouped on one delivery.

Delivery[628] **module**

Consult the information about deliveries and add items to CREATED or CLOSED deliveries.

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Imaging on demand[635] **module**

Deliver documents to customers as scanned images (typically over ActiveWeb) rather than physically bringing them to the customer.

Return Delivery[645] **module**

Perform the return of a delivery, bringing items into the record center, with the option of adding various services and charges.

Return Verification[658] **module**

Verify that all returned items have been brought to permanent locations, and upload standard move and refile operations from the PDT[762] .(Portable data terminal).

Non Track File[661] **module**

Consult information about auto inventoried files that were ordered but not found in boxes. Information includes the order number, the position of the file on the order and the description which has been entered to find the file.

Shelf Non Track File[663] **module**

Consult information about auto inventoried files that were ordered but not found in open shelf filing. Information includes the order number, the position of the file on the order and the description which has been entered to find the file.

Delivery Imaging[665] **module**

Scan and consult delivery and return slips, as a record of delivery details including customer signatures. Customers can consult these images on your ActiveWeb page.

Delivery Route[639] **module**

Manage deliveries by grouping them into delivery routes, assigning a vehicle and driver, ordering the delivery addresses, and performing 'truck validation' to ensure that the necessary items are on the truck before the driver leaves. Print a report of addresses on a delivery route.

Deleted Order Item[670] **module**

View items deleted from orders, including the time of the deletion and the employee who took the order.

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Delivery Maintenance[672] **module**

Perform various maintenance operations related to deliveries, and produce daily task sheets listing deliveries to return, items to refile, and outstanding disposal and transfer lists

Recurring Orders[681] **module**

Specify parameters of orders to be created automatically by the system according to a predetermined pattern.

9.1.7 Modules associated with accounting

Modules on the accounting tab support automated invoicing procedures within EDC.

Invoicing[689] **module**

Create, edit, review, and print invoices. You may create blank invoices, individual invoices, or batches of Auto Invoices based on customer-specific parameters.

Delivery Billing[712] **module**

View and modify charges associated with individual deliveries, so that the invoice based on these deliveries will be accurate at billing time.

Delivery Type[722] **module**

Configure the behavior and pricing of each delivery type.

Box Type[727] **module**

Define the volume, price codes for various operations, and number of boxes on a pallet for each box type.

General Pricing[734] **module**

Establish and manage price codes used in mapping all of the billing behavior in EDC. Various parameters of a price code affect the description that appears on the invoice in each language, pricing and discounts, and how each price code can be used.

Customer Pricing[743] **module**

Override the pricing and description of price codes for individual customers. Apply global rate adjustments.

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Periodic Invoice Item[749] **module**

Specify recurring costs to be added directly to the automatically-created invoice. Daily, weekly, monthly, and annual charges are possible.

Departmental Invoicing[753] **module**

Configure invoicing behavior for specified groups of departments for customers with departmental billing[250], leading to invoices separate from the global invoice for these (groups of) departments.

Customer Volume Usage[757] **module**

View various summary reports of the volume of boxes stored for customers, broken down by different criteria.

RimsLink Pricing[760] **module**

Map price codes for invoicing of customers shared with other record centers.

9.1.8 File menu options

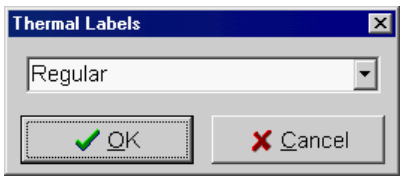
To change label options with old thermal printer drivers: - obsolete

With newer printers that make use of windows printer drivers, these settings do not apply, and you have far greater freedom to configure thermal label templates[382].

With older printers that print through a direct serial connection, labels are limited to several pre-configured formats. This menu option permits you to changes which formats are selected for the current session. When EDC is exited and re-started, it will revert to the default settings in the System information module.

To select a different template for the current session:

1. From the Main Window, click **File->Thermal label options->Box | File | Picking**. A window appears:



2. Click on the **drop-down button** and to choose one of the available formats, then click **Okay**. For details on these formats, see the topic on box label formats[367] in the System Information module.

To use simplified graphics in EDC:

The simple interface eliminates some of the graphics from the standard EDC interface, making EDC run faster over remote connections such as Citrix. To activate the simple interface:

1. From the Main Window, select **File->Simple Interface**

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To end the current session of EDC:
1. From the Main Window, press **Alt+F4**, or select **File->Exit**.

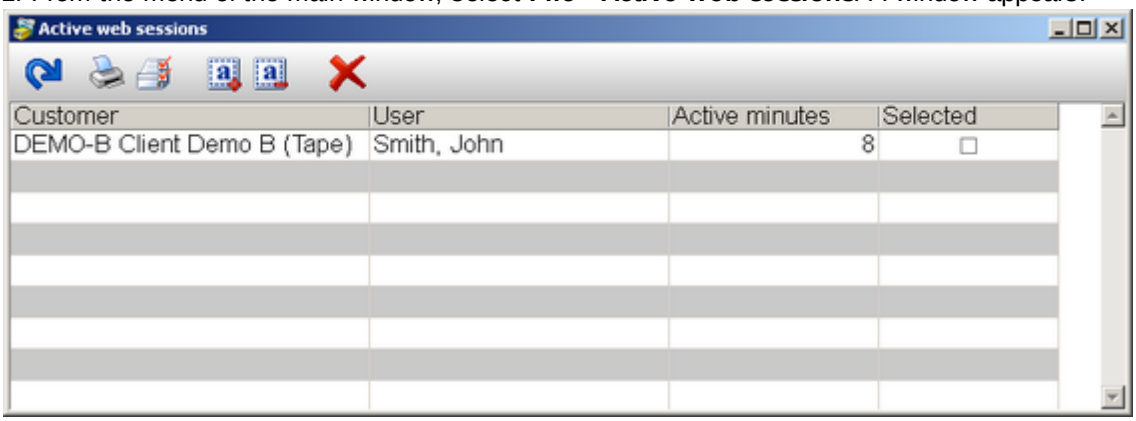
Note that pressing **Alt+F4** or selecting **File->Exit** from within a module window will close the module rather than the session of EDC.

9.1.9 Managing active web sessions

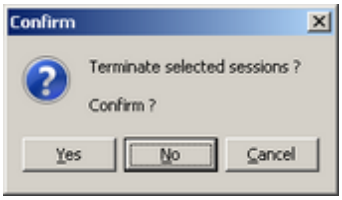
The active web sessions interfaces allows you to see who is connected to ActiveWeb, and if necessary, terminate selected sessions. This can be useful for performing maintenance or for assisting customers if all their web licenses are in use.

To view or terminate active web sessions

1. From the menu of the main window, select **File->Active web sessions**. A window appears.



2. You may sort by any column by clicking the header. For example, if you are searching for a session that has been active a long time, sort by the Active minutes column.
3. If you wish to terminate one or more sessions, select them by clicking in the **selected** column, then click the red **X**. A window appears



4. Click **Yes** to terminate the session. The session will be terminated and will no longer appear in the list of active web sessions.

(**Note:** If a customer attempts to work with a terminated web session, they will get an error message that their session has expired.)

5. Close the window when finished.

This function requires the RPC server settings[371] (Internal LAN) in the **System Information** module

9.1.10 Help menu options

Help->Contents

Pressing **F1** from a module window will typically open the help manual to the topic for that module. In

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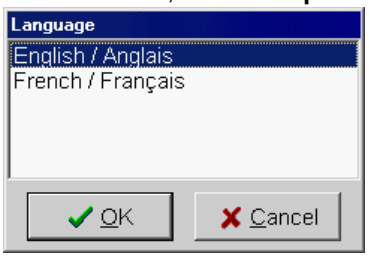
contrast, selecting **Help->Contents** from most windows in EDC will open the help manual to the table of contents. From here, it is possible to search or browse for the desired topic. Note that the help format requires either Windows XP or earlier, or a download available from Microsoft to support the old help format on newer versions of Windows operating systems. Most people simply use the online manual through DocuData's website, http://docudatasoft.ca/support/edc-rc-manuals/

Help->Change Language

To toggle between the available languages for the current session of EDC:
1. From most windows, select **Help->Change Language**. A window appears:



2. Select the desired language, and click **Okay**.

Note that the language settings can be specified for each employee in the Employee module[340].

Help->View Error Log

This option creates a report of errors occurring over a specified date range. This can be very useful in trouble-shooting exceptions and ensuring that the source is addressed.

Help->About

This displays the EDC version number, the number of licensed users, the options activated with the current edition (OCR, replication, imaging, invoicing, advanced modules, etc.), and the current and available box count.

Help->Who am I?

Displays who is currently logged into EDC, and the start time of their session. This is also displayed on the title bar of EDC, as well as with the application name in the windows task bar.

Help->Resources

Displays system information. As a general rule, the following minimal values are requested to insure the proper functioning of the system:

Available Memory	1,000,000 bytes
Disk Space	10 Megabytes
Database level	Must match the EDC applications

9.2 Customer Management (Customer tab)

9.2.1 Outline (Customer)

The Customer tab contains modules for providing individualized service to each customer. (The related Customer Pricing[743] module is found on the Accounting Tab[688]).

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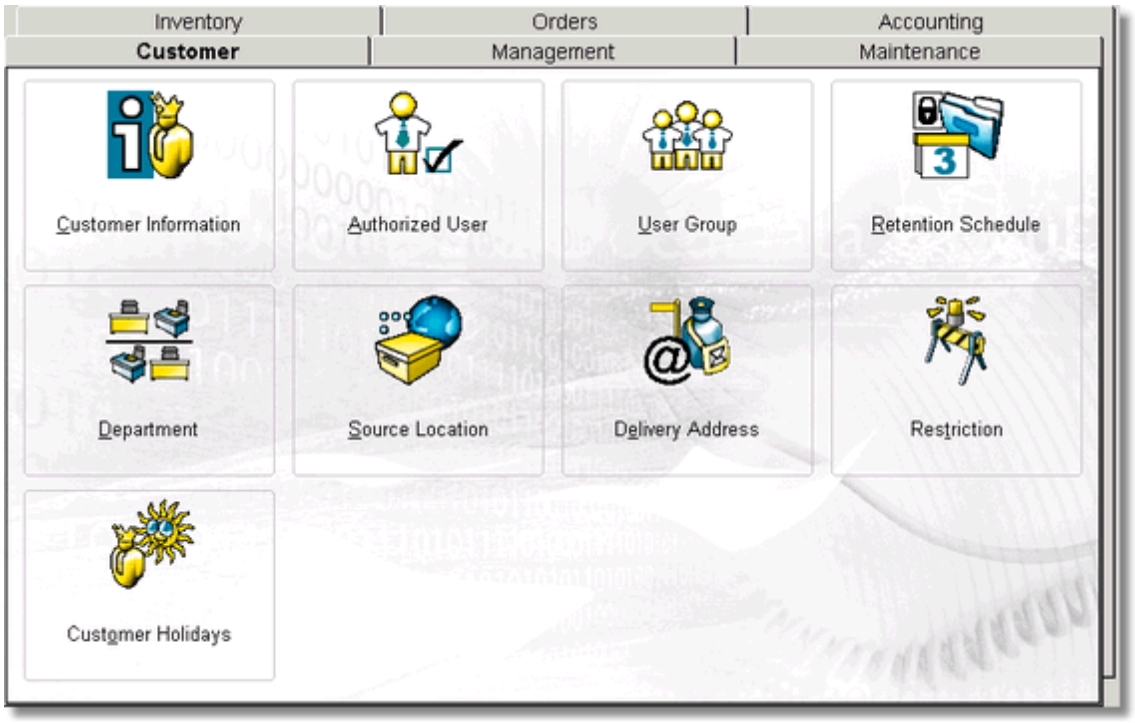

Modules

- Customer Information 246
- Authorized Users 303
- User Groups 312
- Retention Schedule 315
- Department 322
- Source Locations 328
- Delivery Address 329
- Restrictions 333
- Customer Holidays 335

9.2.2 Customer Information

9.2.2.1 Overview (Customer Information)

The Customer Information module is used to configure parameters that apply to a customer company as a whole, and to specify default parameters that apply in the creation of that company's authorized users.

Available reports

- Report (a list of all customers)
- Customer details (detailed list of all customers)
- Current customer (detailed report)
- By creation date
- By renewal date
- Replicated customers (list of customers connected by ActiveFile software)

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- Customers with manual invoices

Fields[248] (see the next section)

Tasks

- Adding, viewing or editing ordering notes[295]
- Setting up to automatically e-mail delivery or return slips[300]
- Setting up a customer to import data using ActiveWeb[127]

Distinctive menu options:

File menu
- Print mailing labels[268] for one or more customers
- Send batch emails[269]
- Export email addresses[266]
- Export web licenses[268]
- Batch full text search activation[272]
- Add customer accounts[273]
- Email client software free trial offer[274]
- Prepare client installation[275]
- Export boxes[275] (Export box data to spreadsheet)
- Export all boxes[275]
- Export files[275]
- Export images[277]
- Export electronic documents[278]

View menu
- Password[279]
- Signing officer[294] (for authorizing destruction lists)
- Web Licenses[279]
- Notes[298]
- Invoice reminder note[297]

Edit menu
- Adding a new customer[279]
- Copy and add[279] (adding a new customer from an existing one)
- Generate web licenses[281] (Generate new web licenses and modify existing ones)
- EDC ActiveFile trial license[283]
- Remote access license[284] (Edit the quantity for ActiveFile trial)
- Add or update web license[284] (manual method if unable to DocuData server)
- Field definitions (Box | File |[284] Copy field definitions to other customers[288])[284]
- Web searches (Web searches |[289] Copy web searches to other customers)[288]
- Web search field definitions (Box | File | Document)[290]
- Labels[291]
- Signing officer[294]
- Add default delivery address[295]
- Notes[298]
- Ordering notes[295]
- Invoice notes[296]
- Invoice template[297]
- Invoice reminder notes[297]

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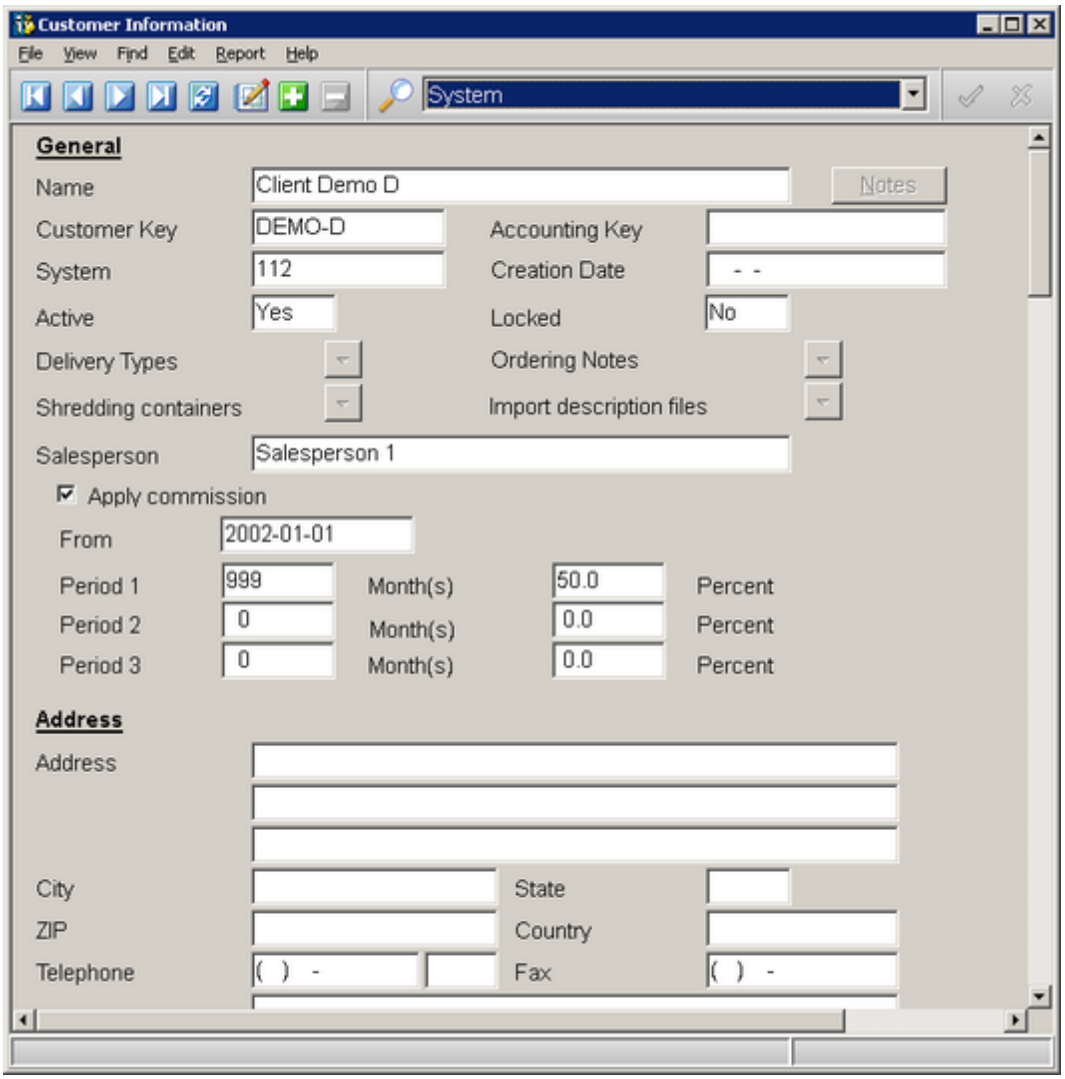
- Delete invoice notes[297]
- ActiveWeb allowed IPs[302]

Report menu
- Box report fields[299] (Adding, configuring or deleting default or custom reports for a customer[299])
- File report fields[299]

Module window



9.2.2.2 Fields (Customer Information)

General

Name

Company name.

Customer Key

Enter a unique code that will identify the customer at the record center. This code is used widely throughout the system, such for order entry and inventory searches. It commonly appears on box and file labels, and is used by your customers in accessing ActiveWeb.

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Notes
General notes about a customer account may be view or modified through the View | Edit menu, or by clicking on this button when in Edit mode. For more details, see Adding, viewing or editing general notes for a customer[298]

Accounting Key
If you export your invoices[700] to an accounting system and this system uses a different key for this customer, you may enter an accounting key of up to 30 characters here. With departmental invoicing, this value may be overridden in the Accounting->Departmental Invoicing[754] module.

System
This system-assigned number cannot be modified and is unique across all EDC installations world-wide. It identifies the customer account in the system. It appears as the middle segment on box and file bar code labels. This means that if you receive boxes that have boxes that have been labeled with EDC labels from another record center, they will not duplicate your own.

Creation Date
The date that the account was created.

Active
Set this field to "No" when a customer is no longer an active customer. This customer will cease to appear on lists, and it will no longer be possible to accept orders or create invoices for them.

Locked
Choice field containing "Yes" or "No". Setting this field to "Yes" prevents the customer from accessing ActiveWeb or placing orders at the record center. This option is typically activated in order to encourage customers to pay overdue bills.

*Delivery Types
Drop-down field associated to a list defined in the Delivery Type[722] module.
This field allows to specify the delivery types that will appear on the choice list of the Orders module.

Ordering notes
Field that allows the addition of complementary notes to the orders.

*Shredding containers
Drop-down field associated to a list defined in the Shredding Container[580] module. These container types will be available to the customer.

Import description files
Import description files enable you to import box and file information for customers. Clicking this drop-down box allows you to make these available for your customers to import properly-formatted spreadsheets on ActiveWeb. For more details, see Setting up a customer to import data using ActiveWeb[127]

*Salesperson
Alphanumeric field that can contain a maximum of 30 characters.
This field indicates the name of the salesperson associated with the account. This is used in creating the commissions report[301].

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Commission-related fields are only visible to employees who have access to the commissions report[340] through the employee module.

Apply commission
If selected, transactions related to this customer will be included in the calculation of commission on the commissions report[301] . Commissions are calculated from the **From** date, at the specified **Percent**, for the specified **Period**(s).

Address
Customer's contact information, such as his main address, telephone number, fax number or email address.

Exclude from mail list
If this option is not selected, this email address will be available to be included when sending batch emails[269] through EDC and when exporting email addresses[266] .

***Billing**
Bill to
These fields contain address information used on customer invoices. If no information is entered, the default customer address is used.

Attention
Information used for mailing labels.

Bill to another client
Selecting this option allows you to have all charges for this account appear on the invoice of the account specified in the drop-down field to the right. This is useful for large organizations that have multiple accounts but wish to receive only one invoice. To use this option, the main account must have Legacy Invoice setting set to No. Departmental invoicing methods do not apply in this case.

Email
This field allows to enter the customer's email address (in order to facilitate communication or to send invoices --- see the billing settings a bit further)

Auto Invoice
Choice field containing "Yes" or "No".
When this field is set to "Yes" the customer is added to the selection list for automatic invoices, which are produced from the Billing module.

Net days
This numeric field is only used as a reference, it represents the payment terms for the customer. This appears on the invoice at the top right of the invoice.

Default Charge Code (significant when the Billing field is set to "Charge Back").
This field allows to enter the charge code used by default for billing purposes when no specific charge code has been chosen for the customer.

*Billing
Choice field containing "Regular", "Department" or "Charge Back".
According to the value entered here, the customer charges will be grouped (Regular), divided by department (Department) or divided by charge codes (Charge Back). The value of this field will have an

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impact on the display of the invoices.

Note: For customers billing by Department, one should create departments in the Department module of the Customer section. One should also go in the Department Billing module of the Accounting section in order to enter specific information concerning the invoicing for each department.

Invoice Start Month

Choice field that can contain any month of the year.
This field indicates when the customer was billed for the first time in the year. It is generally the month when the first box was received at the record center.

Invoices/Year

This numeric field allows to specify how many invoices are sent to the customer each year.
When the field Invoices/Year is set to 6, the customer will receive 6 invoices in the year.

Note : The Invoice Start Month and the Invoices/Year fields have an impact on the auto-creation of invoices for a specific month. When the Auto Invoice field is set to "Yes", it only means that the customer is added to the selection list for these invoices, but does not mean necessarily that he will receive an invoice every month. For example, auto creating invoices for June will not include a customer which is billed 4 times a year and whose invoice start month was February, because normally this customer receives an invoice in February, May, August and November.

Min. Cost/Month

This field indicates the minimum amount to charge a customer every month. If incurred charges are less (storage fees, services, etc.), and adjustment will be applied for the difference. If the **Storage** box is checked, the adjustment calculation will consider only storage fees. In this case, it will not be applied unless the customer has non-zero billed storage. (Note that items billed at a rate of 0 are not considered.) The description on the invoice is taken from the price code MINV, but the price is taken from this field in the customer information module.

Separate Rent Invoice

Choice field containing "Yes" or "No".
When this field is set to "No" it means that the rent will be charged with the rest.

Rent Inv. Start Month

Choice field containing the months of the year.
It indicates the month that the invoicing will start for the rent.

Storage Invoices/year

Numeric field containing numbers from 0 to 12.
It indicates the number of times per year the invoices will be sent for the rent.

Note: When billing the rent and the service separately, the number of rent invoices per year must be smaller than the number of service invoices a year.

*Page brk. detailed inv.

When setting this field to "Yes", it allows to separate the invoices (created in the Invoice module) in several pages when they have different departments. For example, if a customer has several departments, the invoices for one department will appear on one page, the invoices for another department will appear on another page, etc.

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*Billing Building
This field indicates which building of the record center is sending the invoices.

Taxable
Choice field containing "Yes" or "No".
When this field is set to "No" it means that the applicable taxes cannot be added to customer charges. This can be useful when the customer is a government agency to whom taxes do not apply.

Hide zero lines on invoice
With this option set to "Yes", invoice lines with 0 total charge will not appear on the invoice, the detailed invoice, or the delivery summary.

Business
Drop down field associated to a list defined in the Business Type[350] module.
This field allows to specify the business type to which belongs the customer.

Highwater storage
Highwater storage billing is an option for billing in arrears based on the highest storage volume during the period.

- The system finds the day during the invoicing period when the number of boxes was at highwater and bills for storage for that period based on that day.
- If billing by department, the departmental breakdown is based on the breakdown on the day that had the highest volume.
- A temporary global invoices is created (as if the account is not invoiced by department), then charges are then split into departmental invoices, with any unallocated charges being billed to the main account invoice.

Purchase Order
This field allows to enter a purchase order number that will appear on the customer's invoices.
For accounting needs, big organizations frequently resort to this behavior, in order to easily track the expenses of their subsidiaries.

Renewal Date
This field indicates the date when the contract between the customer and the record center is ending and should be renewed.

Charge Rent
Choice field containing "Forward" and "Arrears".
When set to "Forward", the rent will be charged for the month to come.
When set to "Arrears", the rent will be charged for the past month.

Storage Calculation
Choice field containing "Daily" or "Monthly".
This field allows to specify how the volume of boxes in storage is counted.
When this field is set to "Daily", the volume is counted on a daily rate and according to the exact number of days in the month, as 28 (February), 30 or 31 days. When this field is set to "Monthly", the customer is billed for a monthly rate, whatever the number of days in the current month.

Storage Credit
Choice field containing "Yes" or "No".

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When this field is set to "Yes", a storage credit is applied to prorate for storage that was canceled during the month. This is based on the date of the delivery created by the system to bill for the disposal or the space cancellation.

(see the Rent from..to[691] field in the Invoicing module for more details).

Days per year daily billing

Daily billing calculates storage charges based on the number of days in the month. Certain customers may have contracts that convert between daily, monthly, and annual charges based on e.g. 360 days per year or 30 days per month, which leads to a higher annual revenue. Changing this value allows you to use this billing method. The daily rate does not adjust for leap years.

*Courier Billing

Choice field containing "Container", "Item","Delivery", "Round trip item", "By item type" or "Item type round trip".

- Delivery: The price code[723] of the delivery type is applied once, without considering the number of items included.
- Container: For the outgoing delivery, price code[723] of the delivery type is multiplied by the quantity of containers on the outgoing delivery, which is taken from the number of boxes and transport containers scanned during packaging or truck validation. For the return delivery, the return price code of the delivery type is multiplied by the quantity of boxes and transport containers (not empty) picked up.

A trip charge is not typically used with this billing method. Note that if the trip charge is used, any free items should be applied through price breaks rather than on the trip charge price code.

- Round trip Item: The price code[723] of the delivery type is multiplied by the total number of scanned boxes and files. If an item is scanned going out and scanned coming back it, it is counted twice.
- Item: For the outgoing delivery, the price code[723] of the delivery type is multiplied by the total number of scanned boxes and files. For the return delivery, the total number of returning items are charged at the return price code specified for the delivery type[723].
- By Item Type: Delivery handling charges for each box or file are taken from the box type. For outgoing items, the delivery price codes are used. For returning items, the return price codes are used. For open shelf files, the require price code OSDL is used for delivery and OSRT is used for return.
- Item Type Round Trip: Delivery handling charges for each box or file are taken from the box type. the delivery price codes are used for both outgoing and incoming items. For open shelf files the require price code OSDL is used for delivery and OSRT for return.

*Service only

Choice field containing "Yes" or "No".
When this field is set to "Yes", it means that the customer is not storing any boxes at the RC (usually these clients are the ones that only buy line items.)

C.O.D.

This term is short for "Cash on delivery", and applies to service-only accounts being serviced with rcMobile. After the shredding service is performed or the line-items have been delivered, rcMobile will prompt the driver to collect payment from the client and will issue a receipt by e-mail once the payment is processed.

*Use box types

Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer will be considered as a box type user, which means that

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box types will be used to compute rent and service charges (according to the settings in the Box type 727 module). If the field is set to "No", the box types won't be used at all, instead the default price codes will be used for service and the rent will be calculated by volume. See also the Courier billing 253 field to see how this option affects the invoicing.

Bill Full month add/del

Choice field containing "Yes" or "No".
When this field is set to "No", the boxes that were added or deleted in the inventory are billed for the real storage time (see the Rent from..to 691 field in the Invoicing module for more details). For example, a box added on November 20th will be billed for 11 days in storage (November 20th to 30th) and not for the full month.

***Invoice Format**

Choice between Paper and Electronic. When the Paper box is checked the invoices will be printed and sent by mail. When the Electronic box is checked the invoices will be sent by email either in the PDF format or the TIF format. Note that both options can be available at the same time. TIF is typically only used for clients who use Exchange server and have trouble with it stripping information from PDF documents and making them unreadable. You can further Zip invoice files, making the files smaller and potentially allowing PDF files to get through to clients who could not otherwise receive them.

Hourly Rate

This field indicates the hourly rate the customer is charged for labor.
For example, when a customer retrieves a non track file from the inventory, an employee has to search for this file in the box. The customer is then charged for the retrieval and for the search time. Note that this rate is used in place of any value entered for price codes with a measure of time as units (e.g.. minutes or hours).

***File Tracking Charge**

Choice field containing "Yes" or "No".
When this field is set to "Yes", the RC will charge a certain price for tracking files (in-box or on shelf.) Make sure that you set the right price in the General Pricing 734 module (FTK0).

Zip invoice files

This options compresses invoices in a zip format before attaching them to invoice e-mails, making the files smaller and potentially circumventing the problem where PDF files become unreadable when sent through certain incoming e-mail servers.

Legacy invoice

When this field is set to "Yes", the system will use the built-in invoice layout. When it is set to "No", invoices are based on a customizable template. You may establish a default record center invoice template 380, which may be overridden by a default customer invoice template 297 or a template specific to the individual invoice 710.

Minimum Touches Box Change Charge

Numeric field that is used to determine if a box can be billed for a box change.
For each customer, the minimum number of "touches" on a box is configured. A cardboard box change is billed if a box has reached or exceeded the minimum number of "touches", since the last box change or since the box has entered the record center for the first time.

A touch is considered one of the following:
- The box has an OUT history, IE, has been ordered
- One or more files in the box have an OUT history, IE, files have been ordered.

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There is a maximum of one touch per day. This is to prevent "noise" touches, IE, if 10 files get pulled from the same box on the same day, this only counts as one touch.

See also the Box Chg Delivery Type[369] field in the System Information module.

QuickBooks Class

Alphanumeric field that can contain a maximum of 40 characters. This field is used in exporting invoice information to QuickBooks. If a value is not defined in customer information, the value from System information will be used by default. This would typically be useful if you are running two types of business out of EDCRC, for example if your shredding and records management operations are separate for accounting purposes.

No charge boxes out

Selecting this option causes storage charges to not be applied for boxes that are out at the time of invoice creation. This option is rarely used, as it is not industry standard behavior.

Web access fee (1,2,3,4)

Choice field contains values "By Item Count", "By User Count", and "None".

- None: No web access fee is applied through this feature.
- By Item Count: The price code to the right will be multiplied by the total count of boxes, files and/or images, depending on which **Count** options are selected. Charge will be broken down by department based on the number of items of the select types belonging to each.
- By User Count: The current number of web licenses is multiplied by the price code to the right. Charges will be billed to the department selected in the **Bill to** choice field.

The next field to the right permits you to select the price code to apply.
Below that, the Bill to field accepts a department. If the customer uses charge back[250] billing, this web charge will be billed to the default charge code.
The charges will be defined on a monthly basis and appear on the service invoice.

Count / Web License

These fields determine how many of the price code to apply. If you select a web license (from the drop-down of web license types currently available to the client), then the charge will be multiplied by the number of concurrent licenses of that type belonging to the customer. This has the advantage that if you increase or decrease the number of concurrent users in response to client demands, the invoiced amount will automatically adjust.

Less commonly, you may choose to bill for the web license base on the item count. For example, if you check off "images", the cost of the web license would grow as the client's number of stored images increased. You may do the same with the number of files and / or boxes.

Transport container rental ... Bill to

If transport container rentals are invoiced, the department selected here is the department that transport container rentals charges will be billed to. Please see the field below.

Invoice trans. cont. rental

If this field is set to 'Yes', a daily charge will be applied for containers that are delivered on one date and returned on a subsequent one. If the account has departmental invoicing, it will be charged to the department in the previous field. Price codes for container rentals are assigned in the Inventory-

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>Transport Container module ***

Options

Delivery Time
Choice field containing "Both", "AM" or "PM". Effective only when the Delivery Cycle[365] field in the System Information module is set to "Twice a day".
This field determines when the orders for this customer can be delivered.

Pick up time
Choice field containing "Both", "AM" or "PM".
This field determines when the customer's courier can pick up the orders at the record center.

Container Type
- Tape only: With this option, customers will see ActiveWeb with vocabulary and icons defined in terms of tapes. They cannot store boxes and files in this account, and do not have access to related functions.
- Box and tape: With this option, boxes and tapes can be combined in the same account. Tapes are treated as a special box type, with different labels.

Hide quantity from delivery/ret. slip
When set to "yes", the quantity of containers shipped and returned will not be included in the delivery and return slips.

Language
Choice field containing "English" or "French".
This field indicates the language used by the customer to communicate with the record center. This language is also used to produce the customer's reports.

Record series by department
Choice field containing "Yes" or "No".
When this field is set to "Yes", record series are associated to departments in the Retention Schedule module. Assigning an item to a record series will therefore automatically assign it to the corresponding department.

Non-track warning
Choice field containing "Yes" or "No".
When this field is set to "Yes", a warning message appears if a customer tries to order a non track file that was already ordered in the past.

Range Mask
This field allows to set the range mask for the Range field of the Box and File modules.

Delivery Labels
Choice field containing "Yes" or "No".
When this field is set to "Yes", a label is printed and affixed on boxes when they are retrieved from the record center. These labels contain some information, as box number, bar code number, recipient, delivery address and date.

Minimum password length
When new passwords are entered for a customer, the system will verify that passwords are greater than or equal to this length.

Force Passwords

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Choice field containing "Yes" or "No".
When set to "Yes", authorized users at this company must have a non-blank password.

Alphanumeric passwords

Choice field containing "Yes" or "No".
When this field is set to "Yes", new passwords for authorized users must contain at least one number and at least one letter.

Note : When this field is set to "Yes", a non-blank password is required for all authorized users.

Type Integrity
Choice field containing "Yes" or "No".
When its value is "Yes", this field indicates that all the files contained in a box must be of the same type as the type of the box.

Restriction Integrity
Choice field containing "Yes" or "No".
When its value is set to "Yes", it indicates that the files within a box cannot be assigned a restriction that is not already assigned to the box. For example, a box with the "X", "Y" and "Z" restrictions can include files that do not have restrictions and files with the "X" restriction. However, files with the "O" restriction could not be included in that box.

Note : If the type integrity is set to "Yes", the value of the Restriction Integrity field will have no effect since restrictions are associated to record series.

Department Integrity
Choice field containing "Yes" or "No".
When its value is set to "Yes", indicates that all files included in a box must be of the same department as the box.

Disposal Date Integrity
When this value is set to "Yes", EDC will reject an attempt to move a file into a box that has an earlier disposal date than the file.

Replication
Field containing "Yes" or "No".
This field cannot be directly modified. It becomes "Yes" when a customer is set up to use EDC ActiveFile. In this case, data will be periodically synchronized between the record center and the software at the client site.

Disposal Type Integrity
When this value is set to "Yes", EDC will reject an attempt to move a file into a box that has a different disposal mode than the file.

Return to
This field determines the inscription displayed on labels for boxes and files that are out, and also indicates where these items have to be returned later.

Location Mask
Alphanumeric field containing a maximum of 20 characters. This applies to the format used for specifying locations at the customer site using ActiveFile.

Note : The location mask should be carefully thought out so that it accurately reflects the physical

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storage organization.

Default Box Volume
Numeric field containing a maximum of four digits.
This field allows to select a default box volume for all the new boxes added to the inventory. This will typically correspond to the volume of a defined box type[727].

Data capture before accession
When this option is set to 'Yes', if an item created through Auto create preadd Box | File | Tape[427] comes into the record center through the return delivery module for the first time without having been modified through ActiveWeb, ActiveFile, or some other means of capturing data, an error will be recorded in process errors (see Reconciling process errors[673]) and a notification e-mail listing the delivery number and the items not captured will be sent to the *Data capture e-mail* address, which you can set below, near the bottom of this section.

Volume Equivalence, box = Location
This field is used to indicate that boxes of a specified size may be put into locations of a different specified size.

For example, if the Volume Equivalence, box field is set "1.50" and the = Location field is set to "1.20", a box identified and billed as "1.50" may be stored in a location allocated for 1.20. (Test this****)

Order PRE ADD Files
Choice field containing "Yes" or "No".
When the field is set to "Yes", a customer can order PR ADD files.

Hide "Perm Out" option
When set to "Yes", the option to flag boxes and files as "Permanently Out" will not appear at order entry through EDC RC, ActiveWeb, EDC Client, or Active Web for this customer.

Box | File perm out by default
When this option is selected for boxes or files for an account, when placing orders for this account, the check-box to mark this type of item as permanently out is selected by default.

***Validate Date Range**
Choice field containing "Yes" or "No".
When this field is set to "No" the system will not validate if the Start Date is before or after the End Date. This will apply for boxes and files.

Extra delivery slip per order
If set to Yes, one more delivery slip will print for this customer than the default amount.

***File out cards**
Choice field containing "Yes" or "No".
When this field is set to "Yes", an out card is automatically printed and inserted into the box to replace a file that is moved out.

***Open shelf out cards**
Choice field containing "Yes"" or "No".
When this field is set to "Yes", an out card is automatically printed and placed on the shelf to replace a file that is out.

File to search conversion

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Choice field containing "Yes" or "No.
When this field is set to "Yes". if a customer places an order for a file and the file is not found, he will be billed for a file search instead of a file retrieval. The delivery slip will indicate "Excluded item" but the invoice will indicate "Search service" and not "File picking".

A record is added to the Non Track File module. If the file record did not exits prior to the order, the file record is deleted. If the record did exist, it is not deleted, and a history of "EXCLUDED" is added to the original file record.

Sealed Box
Choice field containing "Yes" or "No".
When this field is set to "Yes", a customer's boxes must never be opened at the record center, even to inventory files within a box. When this customer places orders for files, he will receive the entire box.

Limit to one building
Choice field containing "Yes" or "No".
When this field is set to "Yes", it means that all the customer's boxes have to be stored at one place only, especially when the record center has many buildings.

Building
This field determines the following:
- Where line-item requests are handled, if not specified for the delivery address
- Which building the tax rates are taken from.
- If the previous field is set to "Yes" then it also indicates the only building where the customer's boxes can be stored. In that case, this building code will appear on the delivery slips for that customer and will guaranty the return of its documents to the right building at the record center.

Has split
This field indicates that some of a customer's boxes (generally from a complete department or sub-department) have been transferred to another customer's account.

Unique file number
Choice field containing "Yes" or "No".
When this field is set to "Yes", every file added to the inventory for that customer must have a single number, otherwise the system will reject the addition and will mention that its is a duplicate file.

Time with by date order
Choice field containing "Yes" or "No".
When this field is set to "Yes", it will be possible to indicate a specific time for delivery when placing an order by date in the Order module. A note will appear at the bottom of the delivery slip and will indicate the time in question.

Order Grouping
Choice field containing "Yes" or "No".
When the field is set to "No", a separate delivery is created for each order placed by this customer. When it is set to "Yes", regular and by date orders for the same delivery cycle and address with compatible delivery types will get grouped onto a single delivery when deliveries are created.

By time orders are always grouped immediately onto their own deliveries.

Tape Number Change
Choice field containing "Yes" or "No".
When this field is set to "Yes", it authorizes to change the tape numbers in the Box module. (***test)

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Immediate Delivery
Choice field containing "Yes" or "No".
When this field is set to "Yes", the "Regular" and "By Date" orders are grouped separately and each of them has a delivery created immediately.

Default box number length
Numeric field that can contain a maximum of 2 characters.
This field is efficient only when the next field is set to "Yes". It allows to specify the length for automatic box numbers. When the RC number of the box is shorter than this value, the system adds zeros beside the automatic number; when the RC number is longer, the current value has no effect. A typical value of 5 would accommodate 99,999 for a given customer.

Automatic box number
Choice field that can contain "Yes" or "No".
When this field is set to"Yes", the system auto-generates a number for boxes added to the inventory; it attributes them a default number that matches the RC number padded to the correct number of digits, if available. If this number has already been assigned as a box number for the customer, the RC number followed by a dot and the first available digit that makes it unique will be used. (e.g.. 00001.1).

When this option is set to "Yes", a check box to make the field "Read Only" appears. If selected, the system will prevent you or the customer from modifying the box number.

Default file number length
Numeric field that can contain a maximum of 2 characters.
This field is efficient only when the next field is set to "Yes". It allows to specify the length for automatic file numbers. When the RC number of the file is shorter than this value, the system adds zeros beside the automatic number; when the RC number is longer, the current value has no effect. A value of 7 accommodates 9,999,999 files per customer.

Automatic file number
Choice field that can contain "Yes" or "No".
When this field is set to"Yes", the system auto-generates a number for files added to the inventory; it attributes them a default number that matches the RC number padded to the correct number of digits, if available. If this number has already been assigned as a file number for the customer and file numbers are set to Unique, the RC number followed by a dot and the first available digit that makes it unique will be used. (e.g.. 0000001.1).

When this option is set to "Yes", a check box to make the field "Read Only" appears. If selected, the system will prevent you or the customer from modifying the box number.

File in box tracking
Choice field that can contain "Yes" or "No".
When this field is set to "No", the record center can return boxes of a customer without scanning all the inventoried files that they contain. The system assumes that the boxes are complete and all the files they contain are also registered as IN.

Use ID cards
Choice field containing "Yes" or "No".
When this field is set to "Yes", the person that receives documents at the customer's office must show an ID card to the driver of the record center. This ID card proves that he is authorized to receive documents and to sign delivery slips. Furthermore, there is an additional line on delivery slips, that allows to indicate if the person had his ID card when the documents were delivered.

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Note : Any personal ID card can be requested, every record center has its own procedure. The best would be to request an ID card with a bar code and a picture, created by the record center and given to authorized users after receiving an official demand from the customer.

PDT Number Change
Choice field containing "Yes" or "No".
When this field is set to "Yes", when scanning a box or file with the PDT, it will be possible to assign a customer number. The customer box/file number will be changed in EDC, and a history will be added if a new number is assigned with the PDT. When the number changes, the Old Number field in the box and file tables will be updated.

Position of extra fields
Choice field containing "Top" and "Bottom".
This field determines if the extra fields will be at the bottom or at the top of the File module window.

Delivery with PDT175
Choice field containing "Yes" or "No".
When this field is set to "Yes", the option to deliver with PDT can be used for the current customer. When arriving at the customer's site, this option allows to scan the delivery bar code, the items included in the delivery and also the returning items. This increases the reliability for delivery and return of documents.

Bar code on file pick label
Choice field containing "Yes" or "No".
This field is set to No by default. If it is set to Yes, the file bar code will always be printed on file picking labels. If the file has an alternate label, the alternate label will be removed. IF it is set to "No", the file picking label must not cover the original file bar code.

Scan transport container contents

The default value of "No" permits drivers to drop of files at the client site by scanning the transport container alone. If this value is set to "Yes", the driver will be required to scan the items in the container in order to complete the delivery.

Double Pick
Choice field containing "Yes" or "No".
When this field is set to "Yes", double picking is possible. Ex: when scanning a box or file with the PDT and setting it as "not found" on the PDT, after downloading the list to the software, the item goes back in the Picking List module to be picked since the option is set to "Yes". If the item as been set as "not found" a second time, the item is set to "excluded".

Full Text Search at RC
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer has access to the Full Text Search section in the Inventory module.

Show end of rotation on delivery slip
Choice field containing "Yes" or "No".
When this field is set to "Yes", a reminder will appear on the delivery slip for tapes that are being delivered for the last date on their rotation schedule. This reminder appears in bold, above the signature field.

Container count on delivery slip

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This displays the count of transport containers that were scanned out to the client but not scanned back in. This feature can increase the amount of time that it takes to increase delivery slips for large accounts where many containers have not been scanned back, therefore before using this feature for an account you will likely want to make sure that your return scanning of transport containers is up to date.

***Recycle After Destruction**
This option was created for specific needs and may not apply to your operations. It is used to manage media tapes where the content is overwritten with new content.
After the destruction list is uploaded to the PDT, the tapes with the recycle option are scanned by the PDT; the user is then asked to scan a transit location. The tapes' status will be changed to IN in the transit location, while the files (the content) from the tape will be destroyed.

***Use Expected return dates**
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer will be prompted to enter an expected return date when he creates an order. Each file and box will then be associated with this return date. (*** what happens with this?)

Simple Web Interface
Choice field containing "Yes" or "No".
When this field is set to "Yes", some graphics in ActiveWeb will not be displayed. This is done to maximize the space available on screen and to reduce the refresh or loading time of the web page.

Web Time Out
Numeric field determines how many minutes a web connection can remain inactive before the session is automatically terminated for security reasons, after a warning message is ignored. The value can also be set to 'default' (which is typically 15 minutes). It can also be specified for individual users in the Authorized User module.

Notes on paper pick list
Choice field containing "Yes" or "No".
When this field is set to "Yes", the first 400 characters of notes are included as a single line for boxes on paper picking lists.

Default by date order time
Choice field containing "AM" or "PM", specifying the default delivery cycle for by date orders.

Hide labels module on web
Choice field containing "Yes" or "No".
When this field is set to "No", customers using ActiveWeb have the option to print their own box and file labels (with file level web license). This is typically set to 'Yes' when the record center issues pre-printed labels for the customer.

Hide box sale
When this field is set to "Yes", the box sale section will not appear on ActiveWeb for this customer. This is typically used when customers are to order boxes as line items.

Hide alternate labels on web
When this option is set to "Yes", customers will not be able to see or modify alternate bar code label information on ActiveWeb.

User field 1 on delivery slips

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When set to "Yes", Field 1 for both boxes and files will be included in their description on delivery slips and on return slips. This also applies to disposal lists.

Lock list items
When this field is set to "No", items placed on a work list in ActiveWeb can still be ordered and modified, since work lists may be created well in advance. When it is set to "Yes", they cannot.

Require valid recipient
This option ensures that boxes and files can only be ordered for recipients specified in a per-determined list. This can assist both the record center and the customer in complying with regulations such as the American Health Insurance Portability and Accountability Act (HIPAA). Customers using this option typically use the management features of ActiveWeb to maintain a list of valid recipients.

Fixed disposal by default
When No, the item disposal date defaults to variable (IE. calculated based on the record series retention policy). When Yes, the disposal type defaults to fixed date, with a default value of December 30, 3999 to make it easy to identify disposal dates that have not been user modified.

Relax add to list check
When this field is set to Yes, a customer's boxes can be added to a destruction list even if the destruction type for this box does not match. (E.g. a box with 'non-confidential destruction' can be put on a list with 'confidential destruction.) Destruction is billed according to the type of the list.

Index document contents
This applies to ActiveWeb's electronic document management functionality, and when set to "Yes", permits users to locate electronic documents using a full-text search of their contents. This includes office documents and PDF.

Use web setup wizard
The first time you use ActiveWeb with a new account, you may wish to walk your client through the process of renaming their fields, establishing document type retention schedules, and more, depending on which ActiveWeb modules they use. The web set-wizard walks them through each step, with instructions and examples and a button that they can click to get more help. To use this, the authorized user[304] must have full access rights (all modules, departments, document types), along with an Access Level of 9.

Email delivery slip
Check box. If selected, the delivery slip will be sent by e-mail to an address entered in the text-field to the right when a delivery is created or a rush order is picked and closed. An e-mail is also sent to the authorized user who placed the order if an email address specified in the Authorized User module. This e-mail is specific to the order and includes the order number, a list of items on the order, the delivery address, time, and date, and if any items are excluded the reasons given.

If the same e-mail address is used for the authorized user and for the main delivery slip, only one copy of the main delivery slip will be sent.

Email return slip
Check box that, if selected, will cause the return slip to be sent by e-mail to an address entered in the text-field to the right. If there are no items on a return, no return slip will be sent.

Email delivery receipt

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*** While the delivery slip is set at the time of delivery creation, the delivery receipt is issued at the time when the delivery is confirmed using rcMobile. If the driver has a live connection then it will be sent immediately. If not, it will be sent as soon as rcMobile obtains an connection to your database.

Destruction certif. email

***When you complete a shredding job, this is the e-mail address that the destruction certificate will be automatically e-mailed to.

Data capture e-mail

If the data capture before accession setting for the account is set to "yes" above, if boxes for this account are received without data capture through ActiveWeb or EDCRC via the box module or via data import, an e-mail gets sent to this e-mail address.

If the client does their own data capture, then you might use a client e-mail address. If you perform data capture for this account, then you would use an internal e-mail address in this field.

***Accession**

Department

Drop-down field associated to a list defined in the Department module.
This field allows to select the default department for new boxes added to the inventory with a PDT[179] .

Document Type

Drop-down field associated to a list defined in the Retention Schedule module.
This field allows to select the default record series for new boxes added to the inventory with a PDT[179] .

Pick up

Morning picking time/Afternoon picking time

These fields specify the customer-specific cut-off times for picking. If values are present, these will override the picking times specified in the System Information[371] module. (Try to avoid unnecessary exceptions, as they make your operations more complicated and less efficient.)

Regular orders accepted before these times will be picked for the following delivery cycle. Orders that miss the picking cut-off will fall into the subsequent delivery cycle.

Once a day option

Choice field containing "Use value in system information", "Same day", "Next day"
This applies when the delivery cycle in the Management->System Information[371] module is "Once a day", with the "Same day" box selected.

- When this option is **"Same day"**

- if the PM cut off is blank, the AM cut-off is used, and regular orders placed before that cut-off will be delivered that afternoon.
- if the PM cut off is specified (not blank), orders placed before this cut-off will be delivered the next day (in the afternoon)
- If both cut-off times are blank in the customer information, the system information cut-off times will be used.

- When the option is **"Next day"**,

- if the PM cut off is blank, the AM cut-off is used, and regular orders placed before that cut-off will be delivered the next day.
- if the PM cut off is specified (not blank), orders placed before this cut-off will be delivered in two days
- If both cut-off times are blank in the customer information, the system information cut-off times will be

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used.

Delivery cycle option
Choice field containing "Use value in system information", "Once a day", "Twice a day". This allows a record center to override the default scheduling behavior in system information for a specific account, offering some customers twice-daily regular deliveries, and other customers once-daily deliveries.

Contact/Name/Telephone/Fax
Name and coordinates of the contact person for billing, purchasing, contracting or other.

*Mailing Labels
This note, located beside the previous fields, indicates that the contact names are mailing label names for the customer.

Invoices

Print Detailed Invoice
When this field is set to "Yes", a detailed invoice is printed when producing invoices for this customer in the Invoicing module.

Print Delivery Summary
When this field is set to "Yes", the delivery summary for a customer is printed with his invoice.

Print Out Boxes List
When this field is set to "Yes", a list is printed with the invoice of the customer and indicates all the boxes that are still OUT.

Print Out Files List
When this field is set to "Yes", the list of files currently out for this account is included as an invoice attachment with this account's invoice.

Print authorized users
When this field is set to "Yes", a list of active authorized users[305] is printed with the invoice of the customer.

Print Activity Report
When this field is set to "Yes", an activity report is printed with the invoice of the customer and indicates the activities of boxes and files for the billing period. The report layout used is the default assigned in Management->System information, Report->Record Center->Box|File Report Fields.

Delivery calendar
When this field is set to "Yes", a calendar of scheduled and past delivery dates (6 months each way) is included with the invoice. This is especially useful for accounts that have tape rotations or shredding service scheduled. For more details, see the topic on viewing or printing a delivery calendar[630].

Excel box listing
When this field is set to "Yes", a spreadsheet listing the inventory of the account is included with the invoice (if issued electronically).

Fast Orders

Default order user

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Drop-down field associated to a list defined in the Authorized Users module.
This field allows to specify which user will be used by default for fast orders. His/her name will be displayed in the Caller field of the Orders module.

Recipient
This field allows to enter the default name of the person that will receive documents for fast orders.

Delivery Type
Drop-down field associated to a list defined in the Delivery Type module.
This field allows to specify which delivery type will be used for fast orders.

Delivery Address
Drop-down field associated to a list defined in the Delivery Address module.
This field allows to enter a delivery address for fast orders.

Schedule

Override default schedule
Choice field containing "Yes" or "No".
When this field is set to "Yes", all the opened hours scheduled below are possible delivery hours for the customer, even if these hours are not similar to the regular business hours set for the record center in the System Information module. The record center business hours are overridden and on related delivery slips, the system displays the delivery date and time requested by the customer.

Deliver during record center holidays
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer can place and receive orders for every desired day during the year, even on record center's holidays.

Delivery/Opened/Start/End
These fields allow to schedule possible delivery hours on Monday, Tuesday, Wednesday, Thursday, Friday, Saturday and Sunday for the customer. These are the delivery hours taken into account when the Override default schedule field (above) is set to "Yes".

9.2.2.3 Export Customer's email addresses

If you need to have a list of email addresses from your customers, here's how you proceed:

1. From the **Customer->Customer Information** module, go to **File -> Export Email Addresses**. A window appears.

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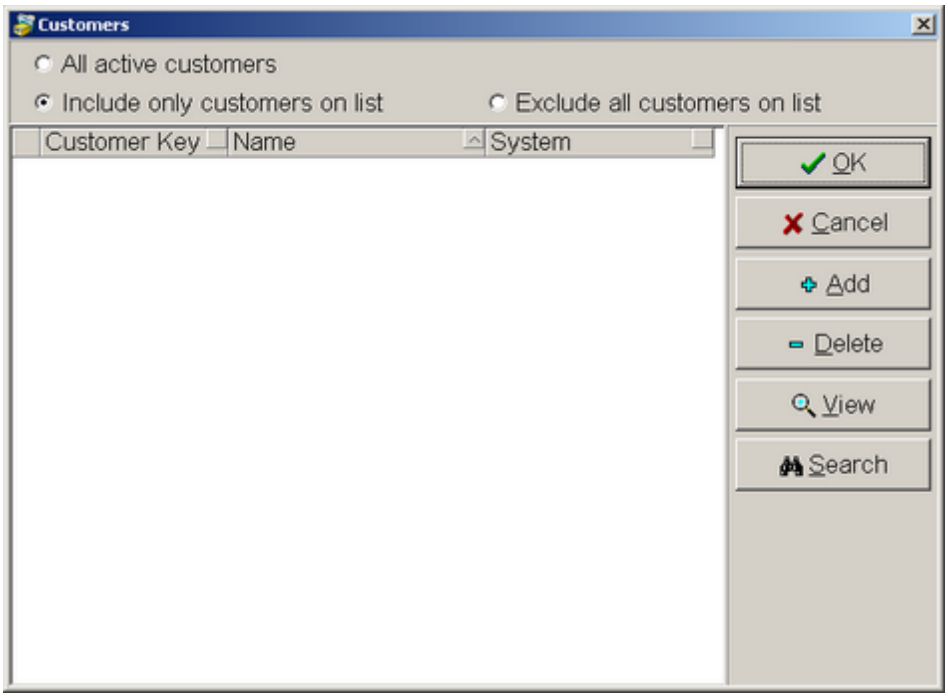
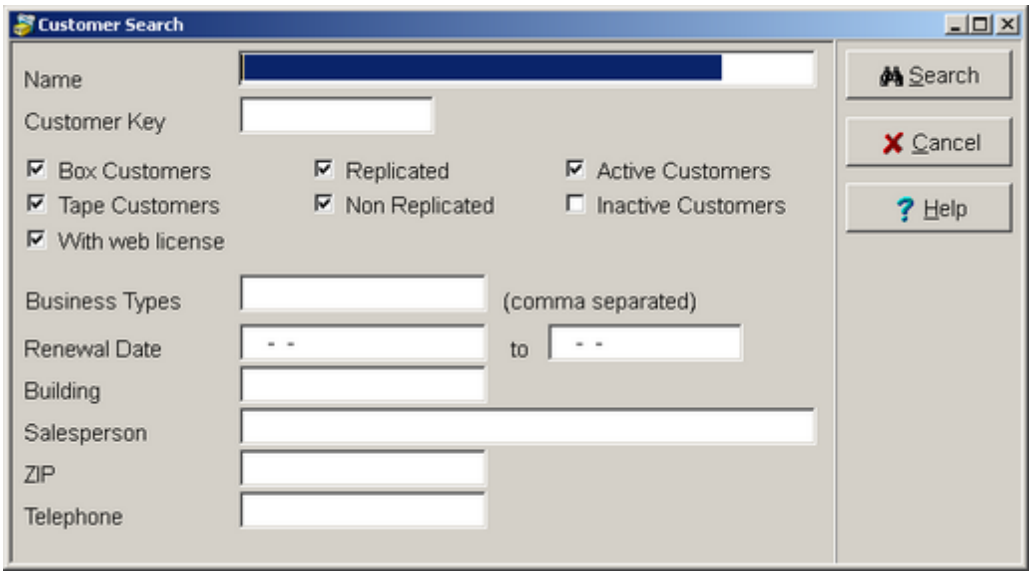


2. Build a list of customers to include, by clicking **Add** and selecting the customers, or Clicking the **Search** button.



3. Select which customers, then click **OK** to get the following screen:

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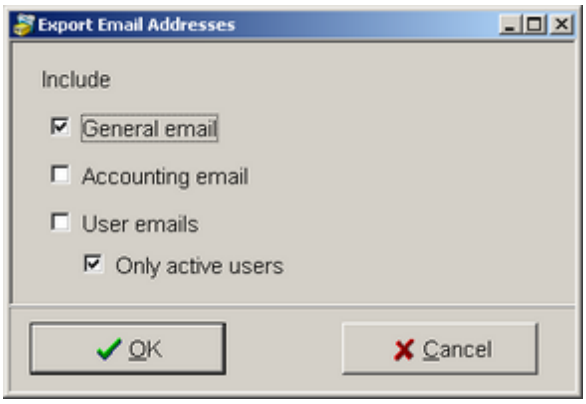
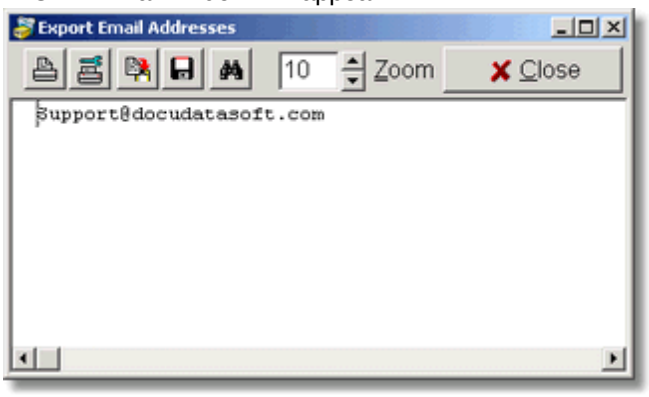


4. Chose to include some or all of General, Accounting and User (Authorized Users) emails, then press **OK**. A final window will appear:



5. The selected e-mails can now be saved as a text file or printed (using the buttons), or copied and pasted from the window.

9.2.2.4 Export web licenses

If you wish to export a list of current web licenses, you may do so as follows:

- Open the **Customer->Customer Information** module.
- From the menu, select **File->Export web licenses**.
- Select the desired export directory.
- The report will be saved as *Web Licenses_[current date].csv*, where [current date] is replaced by a date such as 2015_04_15

The report includes each web license along with the account's customer key and name, the expiration date, the options (e.g. Management+Rotation+Imaging+Active Files+EDM), and the user count.
***

9.2.2.5 Printing mailing labels for one or more customers

To print mailing labels for one or more customers using a pre-defined label format and the name and address information from the customer information, do the following:

1. Click on **Customer->Customer Information** from the Main window.
2. Click on **File->Mailing Labels**. A window appears.

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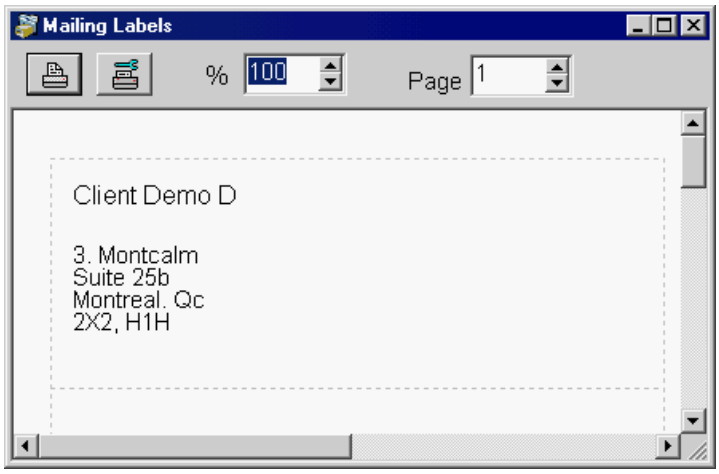
3. Check the desired option and press **OK**. Labels are displayed.



4. Click on the **Print** button, then the **Close** button when finished. The labels are automatically printed from the default printer.

9.2.2.6 Send batch emails

1. Open the **Customer->Customer Information** module and from the menu select **File->Send Batch Emails**. A window appears.

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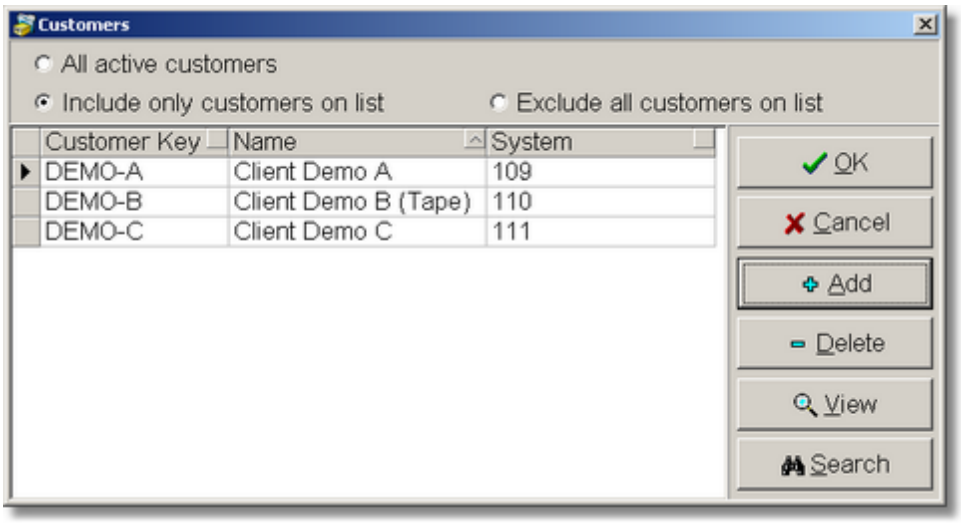
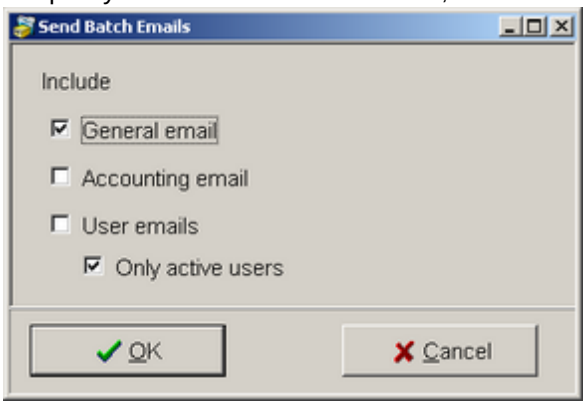


2. Specify which customers to include, then click **Ok**. A window appears



3. Specify which type of emails to use for the customer. General emails are specified in the Customer Information module. Accounting e-mails are specified in the Customer Information module, and also in the Accounting->Departmental Invoice module for customers with departmental invoices. User emails are found in the Customer->Authorized User module. Selecting the "Only active users" box will cause the e-mail addresses of authorized users who are no longer active to be omitted.
4. Click **Ok**. You will be prompted to enter the subject and text of an e-mail.

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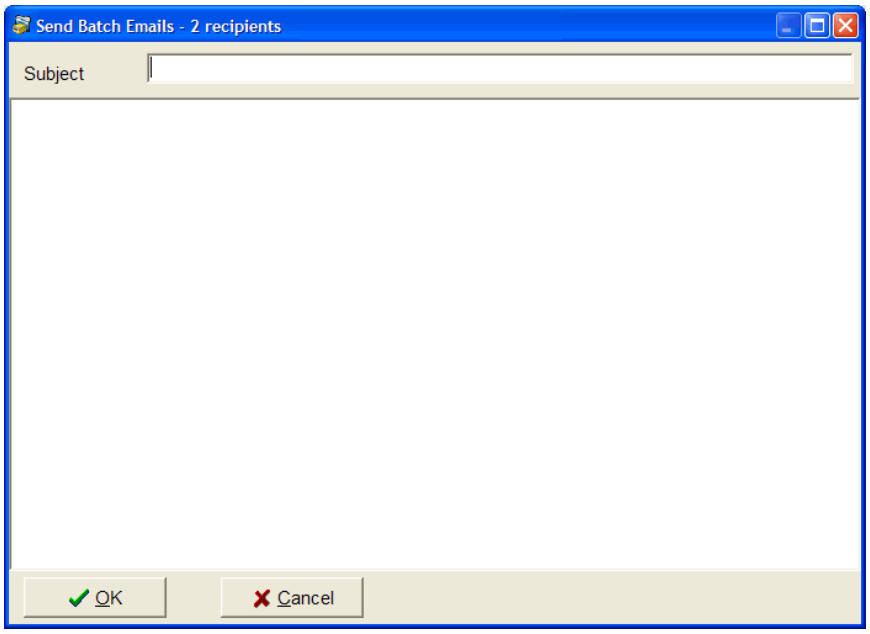
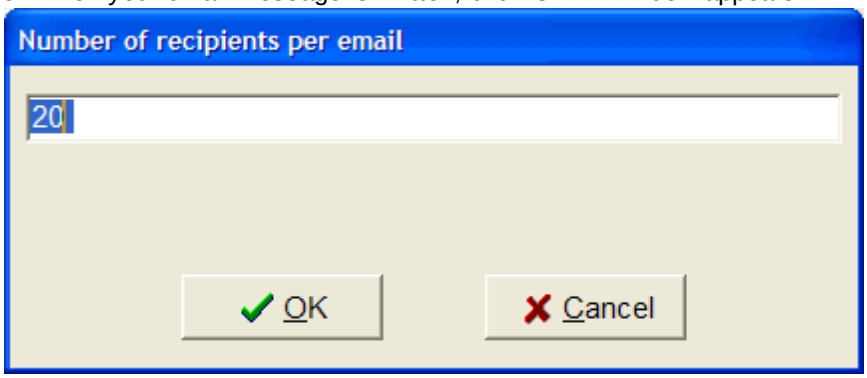
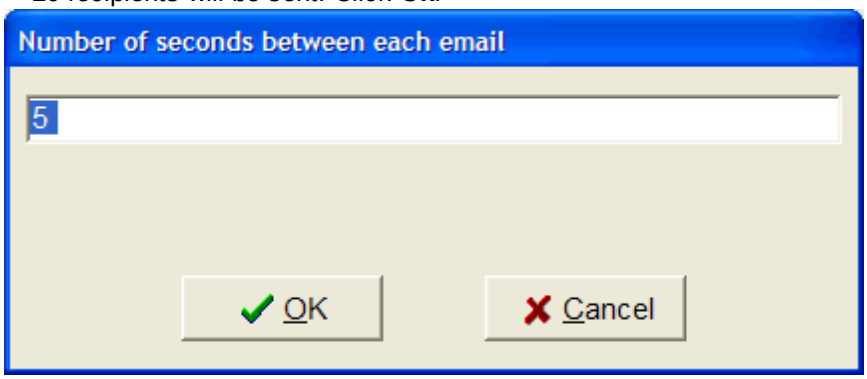


5. When your email message is written, click **OK**. A window appears.



6. Enter the maximum number of recipients per e-mail batch. This may be limited by your e-mail service provider for protection against spamming. If you enter 20 recipients and are sending 100, 5 emails with 20 recipients will be sent. Click **Ok**.



7. Enter the number of seconds between emails and click **Ok**. The default of 5 seconds should work. If not, consult your IT administrator or service provider.
8. If the emails were sent, you will return to the "Customer Information" screen.

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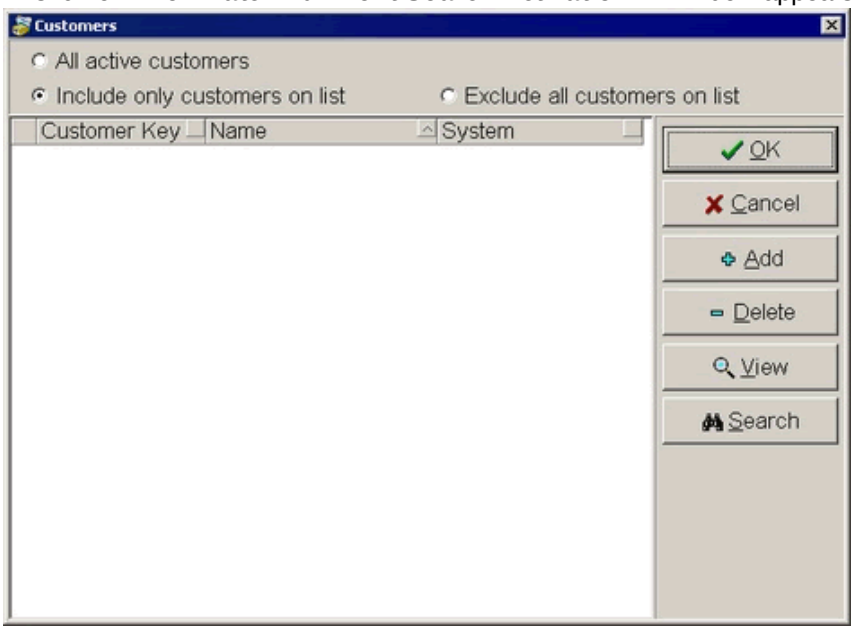
9. If you get the following window, the e-mails were not sent. Have your system administrator verify that your SMTP server is working and is properly configured in the Management->System Information[374] module.

9.2.2.7 Activating multiple clients to use the Full Text Search

This operation activates the Full Text Search option for many customers simultaneously. This will index text fields, enabling advanced searches on ActiveWeb and at the record center.

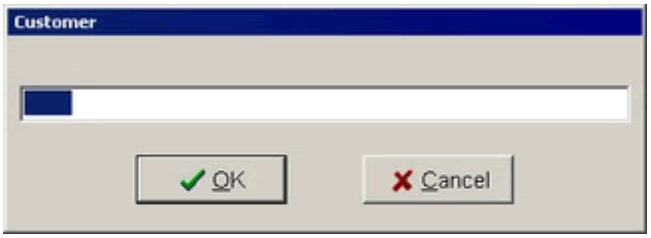
1. Click on **Customer->Customer Information** from the Main window.
2. Click on **File->Batch Full Text Search Activation**. A window appears.



3. Select the All active customers option, or select another option and build a list of customers to include or exclude.

To edit the list of customers (when it applies):

- To add customers, click on the **Add** button. A window appears:



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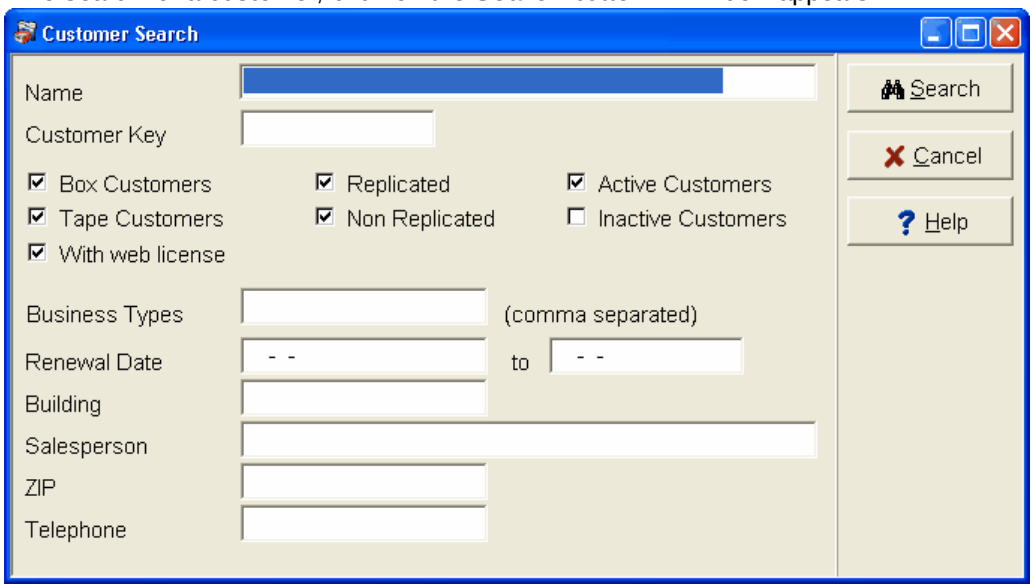
- Enter the customer key and press **OK,** or press **OK** to have the list of customers. The customer selected will automatically be added to the list.

- To search for a customer, click on the **Search** button. A window appears.



- Search which customers by entering information or by checking one or many boxes, then click on the **Search** button. All the clients corresponding to the previously entered description will automatically be added to the list.

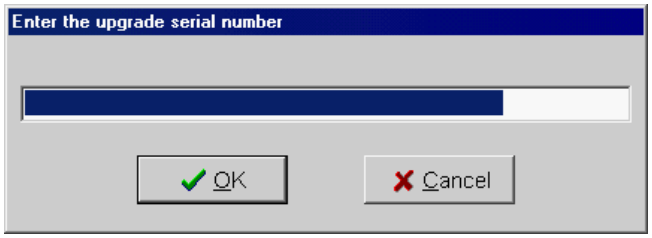
- To delete a customer from the list, select it (it will appear highlighted) and press the **Delete** button.
- To view the information of a client on the list, select it (it will appear highlighted) and press the **View** button.

4. When all the modifications have been made to the list, press **OK**.

9.2.2.8 Adding customer accounts

Each customer has a unique system number that is not duplicated in any other record center using **EDC** worldwide. You have been allocated a batch of customer numbers. When you require additional accounts, contact DocuData for an upgrade serial number, then do the following:

1. Click on **Customer->Customer Information** from the Main window.
2. Click on **File->Add Customer Accounts**. A window appears.



3. Enter the upgrade serial number and click **OK**. More system numbers will now be available for creating new accounts[279].

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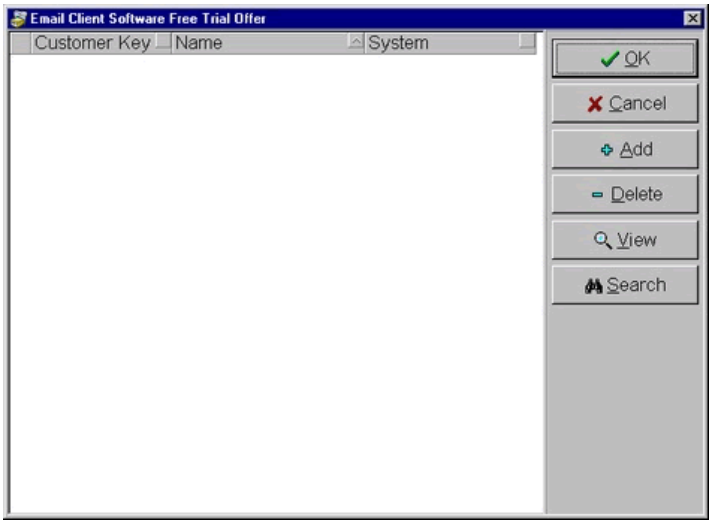
9.2.2.9 Email Client Software Free trial Offer

EDC ActiveFile helps your customer to integrate the management of their active files with their semi-active files at your record center. This may help them achieve greater time and space efficiency by sending more of their less active records to your facility.

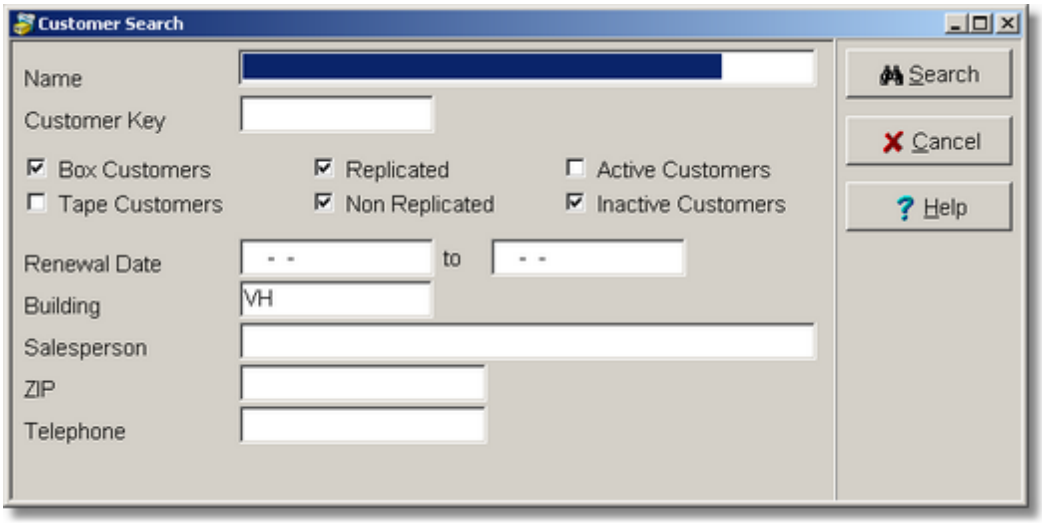
This function helps you to set your clients up with a free trial installation of EDC ActiveFile software.

1. From the **Customer->Customer Information** module menus, select **File->Email Client Software Free trial Offer**. A window appears.



2. List the customers to contact with the offer

- To add by customer key, click **Add** button.
- Enter the customer key and press the **Enter** key.
- If the text entered does not completely match a key, a list of customers will appear, positioned closest to the text you have entered. Highlight one or several customers then click **Okay**.
- To add a customer using a search, click the **Search** button. A window appears.



- Enter parameters and click **Search**. All results meeting all criteria will automatically be added to the list, with the exception of customers who may already be using the ActiveFile software.

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- To remove customers from the list, highlight them and click the **Delete** button.
- To view the details of a customer, select the customer and press on the **View** button. The customer details will appear in another window.

3. When the list is final, press **OK**. A report will appear.

Note: This function requires that EDC be set up to send e-mail (System Information module, under the SMTP section), and that the customer have a valid e-mail in the Customer->Customer Information module. Their password can be found in the same module by going selecting View->Password[279] from the menu.

9.2.2.10 Preparing an EDC ActiveFile installation

EDC ActiveFile helps you to offer comprehensive data management services to your customers, integrating their management of physical and electronic documents, whether these documents reside at their office or in your record center. Please contact DocuData support (Support@docudatasoft.com) for help with setting up a new customer to use ActiveFile.

9.2.2.11 Exporting boxes and files to CSV format

The following steps create a spreadsheet of an account's data. The format of the spreadsheet is CSV or comma separated value. It is a simple text format which can be opened by most spreadsheet applications or text editors.

To export all data for all of a customer's boxes

1. In the **Customer->Customer Information** module, navigate to the desired customer.
2. From the menu, select **File-> Export all boxes**
3. A confirmation message appears. Press Yes if you want to continue with the operation, No or Cancel to abort the operation.
4. You will be prompted to browse to the location where you wish to save the information. Select the location, then click **Ok**.
5. The data will be save in a compressed folder with a name such as Box_[customer key]_[Save date] _0001.zip.

Note that it is also possible to automatically include this document as an invoice attachment[265] with electronic documents.

To export specific boxes or files or specific fields:

1. In the **Customer->Customer Information** module, navigate to the desired customer.
2. From the menu, select **File-> Export boxes | Export Files**.
3. A confirmation message appears. Click **Yes** if you want to continue with the operation, No or Cancel to abort the operation.
4. A message prompts, "Include withdrawn items?". Click **Yes** if you wish to include Deleted, Destroyed, and Transferred items. Click **No** if you do not.
5. A window appears, containing the different report layouts[299] defined for this customer.

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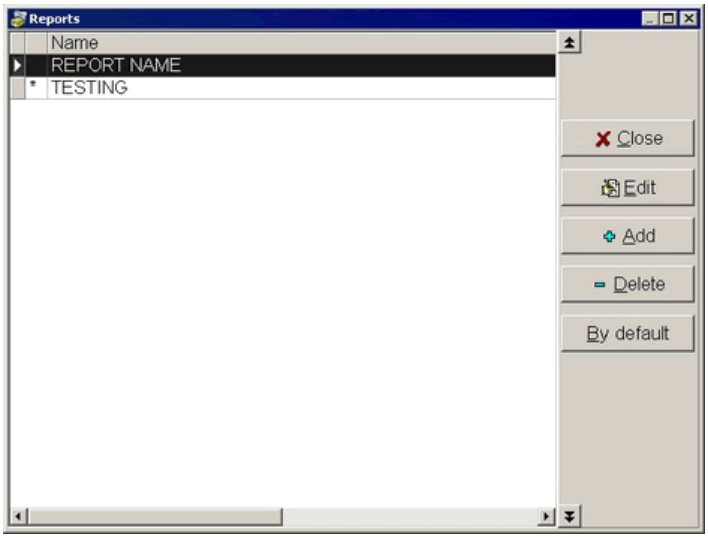
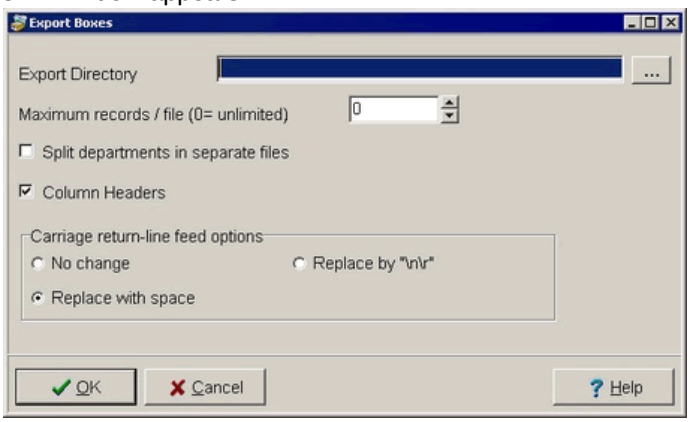


6. Select the desired report template (it will appear highlighted) and click the **Close** button.
7. A message prompts, "Export all boxes?".
- Click **No** if you wish to use the search interface[492] to specify boxes. Otherwise, click **Yes**.

8. A window appears.



9. Specify the output directory, set any options, and click **OK** to complete the export. The data will be saved with a file name such as Box_[customer key]_[Save date]_0001.csv.

- **Export Directory**: You can browse through the different directories by clicking on the browse button. The files that will be created will be added to the directory you selected.
- **Maximum records / file (0=unlimited)**: This allows you to enter the number of files or records that will fit in your file. This is useful when working with excel, because excel spreadsheets have a maximum amount of records that needs to be respected (eg. 65,536). If the value "0" is left as default, the number of lines in the file will be unlimited.
- **Split departments in separate files**: This allows you to separate departments in different files. It can save you time, especially if departments are not allowed to see the inventory of other departments.
- **Column Headers**: Column headers will specify the data that is contained in each column. They will appear at the beginning of each department.
- **Carriage return-line feed options**: This option is specifically for the notes, it indicates what the export will do when exporting notes that have multiple lines.

No change - no changes will be made to the note format.
Replace with space - every time notes have more than one line, the carriage return will be replaced by a space.
Replace with "\n\r" - every time notes have more than one line, the carriage return will be replaced by "new line/carriage return" characters. This ensures that notes will remain on a single line during the

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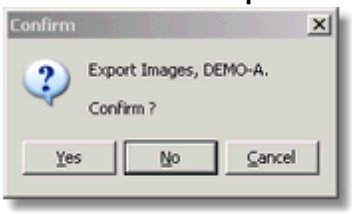
export. Please take note that some programs may not understand these characters.

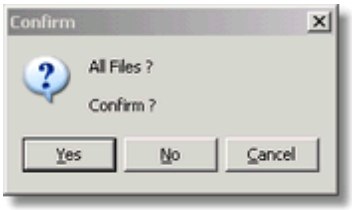
9.2.2.12 Exporting multiple images

EDC RC permits batch export of a customer's images in TIFF or PDF formats.

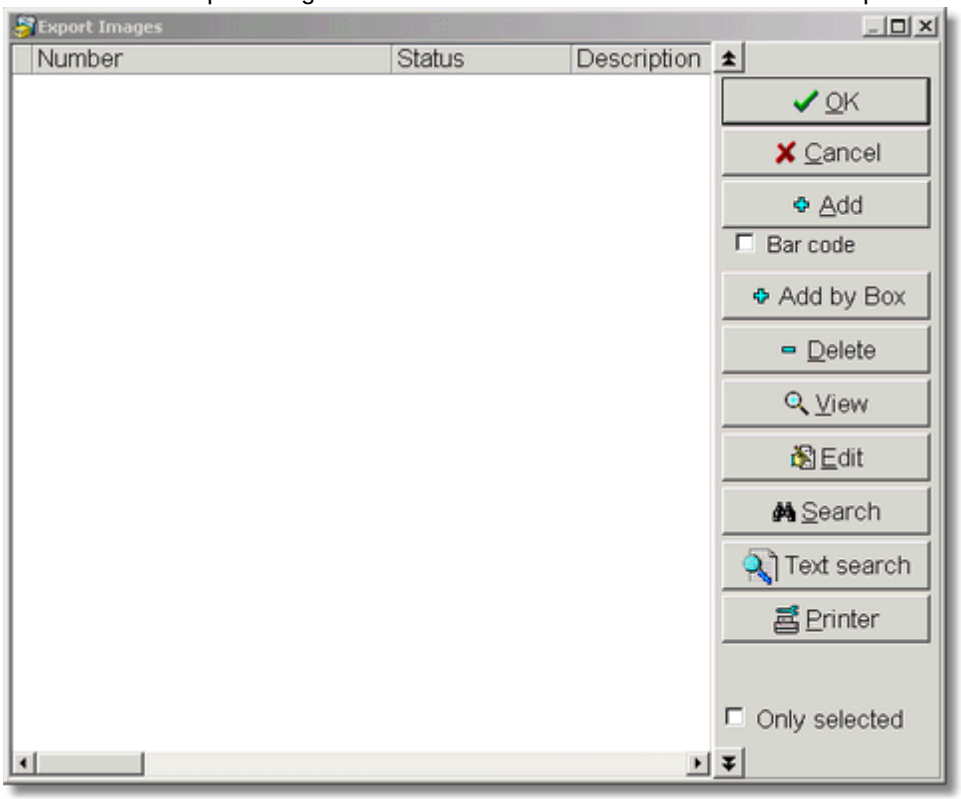
1. Click on **Customer->Customer Information** from the Main window.
2. Navigate to the customer for whom the images are to be exported
3. Click on **File-> Export Images**



4. Click **Yes** to confirm that export is for the correct customer



5. Click **Yes** to export images from all files or **No** to select which files to export



6. Create a list of files to export images from (see **Box and File searches** 492), then click **Okay**.

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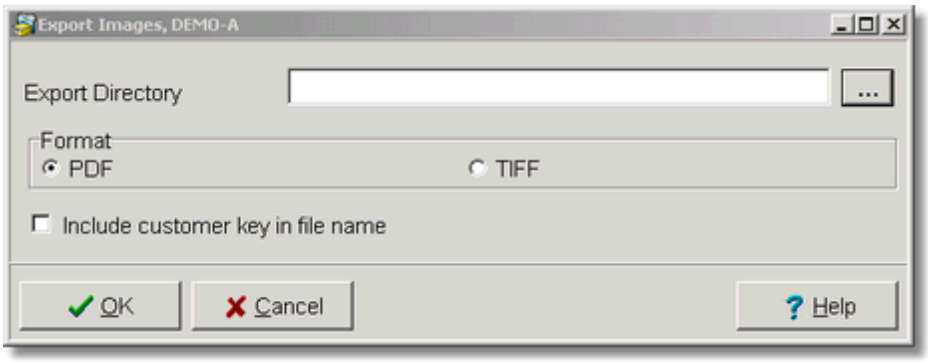
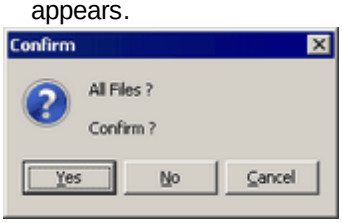


7. Select a location to export the images to, the image format, and whether to include the customer key in the file name, then click **Okay**.

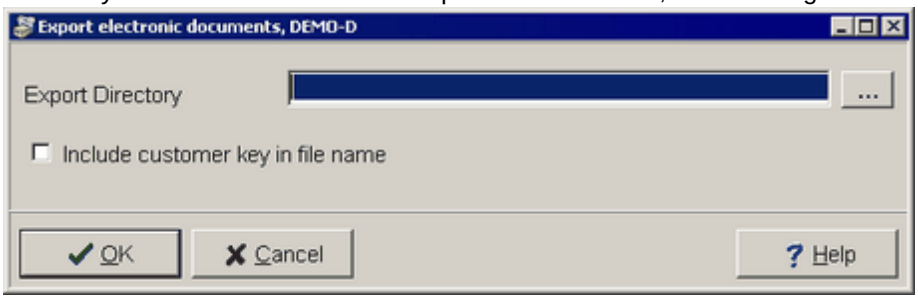
Exported images are named with the file RC number. For example, file RC# 233506 belonging to the customer with key 'demo-d' would be 0000233506.PDF or DEMO-D_0000233506.PDF

9.2.2.13 Exporting some or all electronic documents for an account

1. Open the **Customer->Customer Information** module.
2. Navigate to the customer for whom you wish to export.
3. From the menu, select **File->Export electronic documents**.
4. A message appears to confirm that you have the correct account. If so, click **Yes**. Another question appears.



5. If you click **Yes**, all images will be exported. If you click **No**, the standard list-building interface[492] will allow you to create a list of files to export from.
6. Once you have clicked Yes or accepted the list of files, the following window appears:



7. Specify the export directory and whether or not to include the customer key in the file name, and click **OK**.
8. The documents will exported to the specified location, with the customer key (if specified), the file RC number, and the document description in the name.

(For example, a document belonging to account DEMO-D in file RC#2 with document description Invoice_1 and type .doc would be exported as DEMO_D_2_Invoice_1.doc)

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9.2.2.14 Viewing the password of a customer

This password is used in setting up a customer with EDC ActiveFile.

1. Click on **Customer->Customer Information** from the Main window.
2. Click on **View->Password**.
3. A message appears:

4. Press **OK** to go back in the module.

9.2.2.15 Viewing the web license details of a customer

1. In the **Customer->Customer Information** module, from the menu select **View->Web Licenses**.
2. A report displays the number, expiration date, and type of licenses belonging to the account.

9.2.2.16 Adding a new customer

The preferred way of adding a new customer is to base it on a typical or template customer contract using the copy and add function[279].

Using the **Customer->Customer Information** module's **Edit->Add** function creates a new customer account using default values defined in the system information module. Customer pricing will not be copied, and you will also have to manually assign delivery types, user groups, customer reports, and many other parameters.

9.2.2.17 Copying a customer account

To keep your accounts manageable, it is good practice to have one or a few standard contracts that others are based on. Similarly, we strongly recommend having template accounts based on typical customers, and then copying and modifying these as necessary for new customer accounts.

1. Open the **Customer->Customer Information** module.
2. Navigate to the customer you wish to make a copy from.
3. Click the '+' button, or from the menu, select **Edit->Copy and Add**. The following screen appears:

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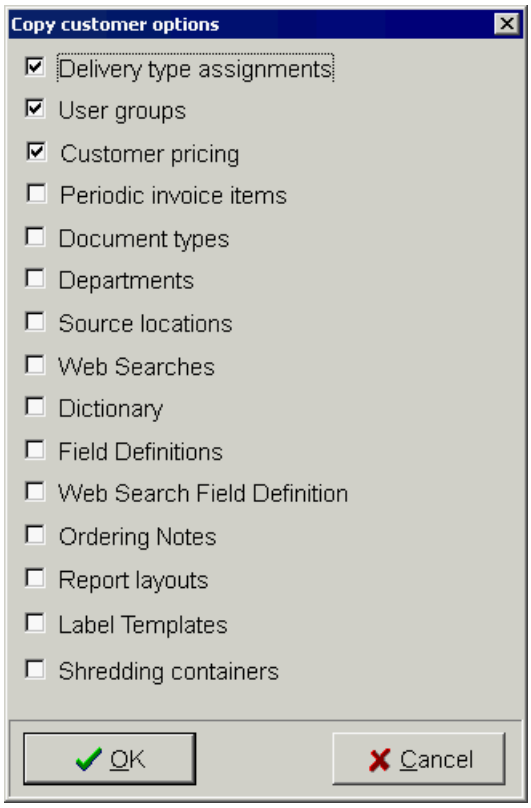
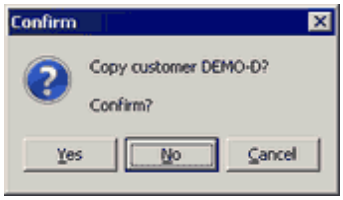


Options for copying:

- **Delivery type assignments:** These will be similar for most customers, though you may for example need to add more urgent and after-hours rush delivery types for nearby lawyers offices, or remove rush delivery for distant customers.
- **User groups:** Copy this. Your template customer will likely include a supervisor user, and perhaps more restrictive groups with less access to data and delivery types.
- **Customer pricing:** Will copy any customer-specific overrides of general pricing. If no customer pricing has been created, nothing will be copied.
- **Periodic invoice items:** If your template customer has a recurring charge such as 2 imaging web license, this can be a valuable option to copy.
- **Record series, Departments:** Pre-add boxes are often created with the record series "Select Type" and the department "Select Department", to prompt users to assign these to their actual departments on ActiveWeb. It is useful to copy these from the template customer.
- **Other options:** Various options that affect the customer's experience on ActiveWeb can be copied as appropriate.

4. Click **OK** to continue. A message pops up, verifying that you are copying from the correct customer



5. Press **Yes** to create the new customer or **No** to cancel the copy.

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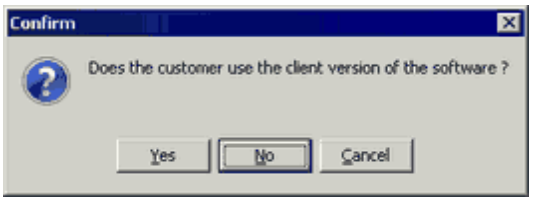
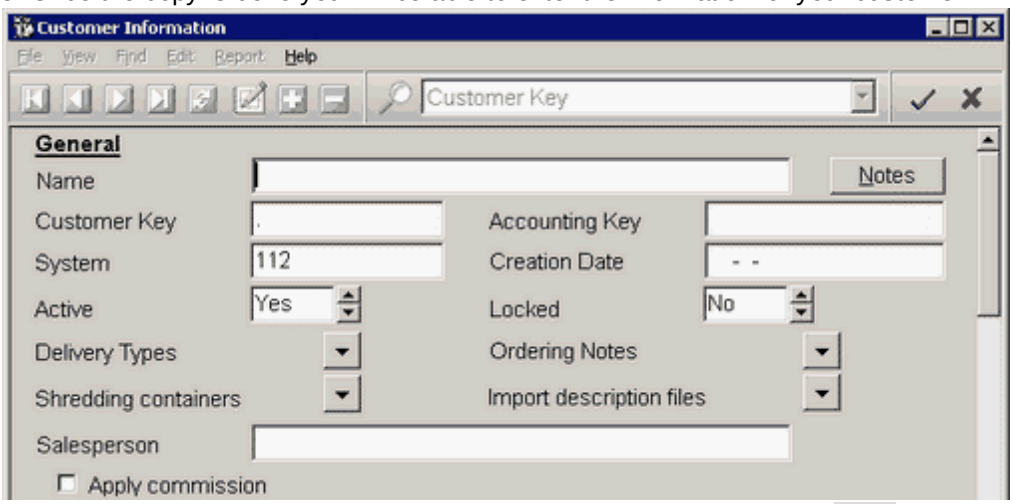


6. If the customer already uses **EDC ActiveFile**, click **Yes** and enter their system number which can be viewed in the **System Information** module of ActiveFile.) Otherwise, click **No**.
7. If you are low, you may need to add more accounts[273].

8. Once the copy is done you will be able to enter the information for your customer:



9. When you are done with the data entry just press the **accept button** to create your new customer.
10. Continue setting up the customer for billing[125].

Your operations manual should list which fields to review when creating a new account. However, here are some of the **commonly altered options:**

- Address information, including mailing and billing e-mail addresses
- Business
- Taxable (for charities and non-profit)
- Invoice format
- File in box tracking
- Automatic Box | File number
- E-mail delivery | return slip (and e-mail address)

9.2.2.18 Generating new web licenses and editing existing web licenses

Web licenses need to be created for clients that wish to use ActiveWeb. If they wish to use Imaging delivery types they should have access to the Imaging functionality.

Generating a new web license

1. Open the **Customer->Customer Information** module.
2. Click on **Edit -> Generate Web License**. A window appears.

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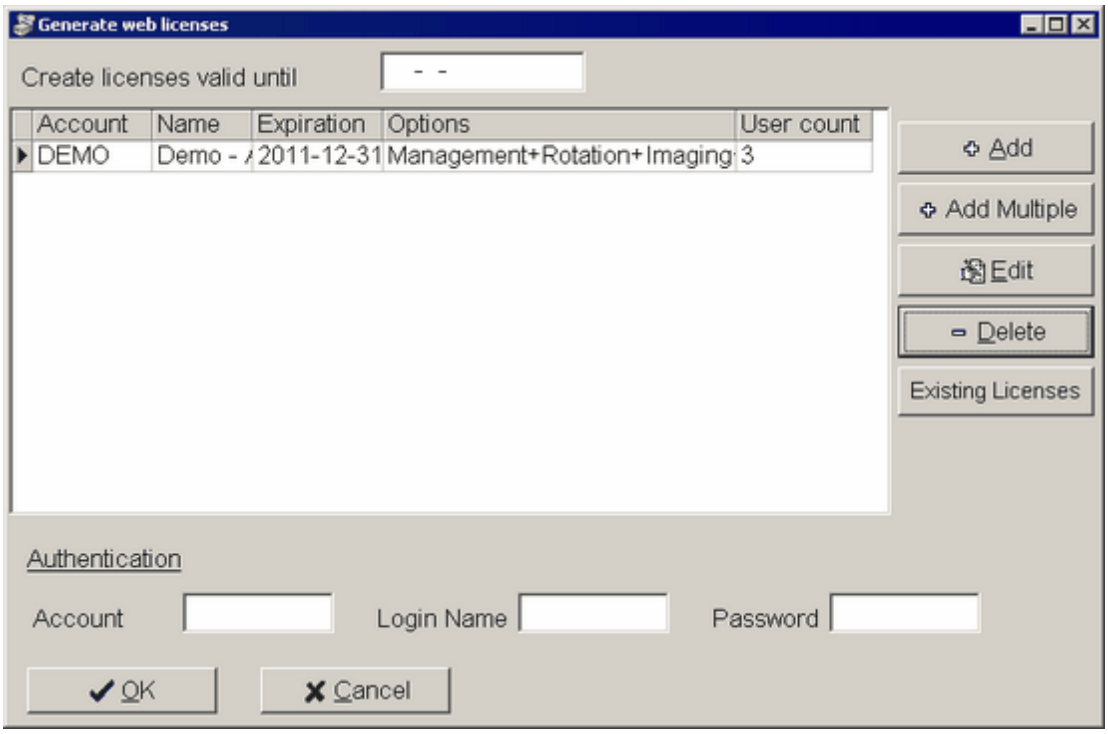
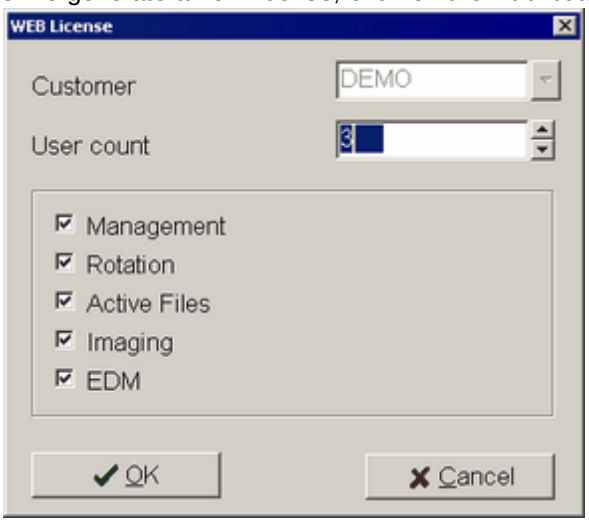


3. Enter a date in the "Create licenses valid until" field.
4. Fill in the DocuData Account key, Login name, and Password of someone authorized to generate web license.
5. To generate a new license, click on the **Add** button. A window appears.



6. Enter the customer code in the "Customer" field or click on the drop down button to have the list of customers (highlight a customer and press **OK**).
7. Enter the number of users that can access the web at the same time for the customer and license type.
8. Leave the options blank to create a basic license, or select additional modules as needed (Management, Rotation, Active File, Imaging, Electronic Document Management (EDM)). (See the ActiveWeb manual for information about what each option provides.)

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Note: An account can have multiple licenses of different type, In the authorized user module you can set which license type[303] each user profile can access.
9. Press **OK**.

Notes:

- The license is normally billed by number of users.
- Selecting one or more licenses and clicking the **Delete** button removes the licenses from the list to be updated. It does not delete an existing license. You can delete a license by setting the expiry date or by setting the number of users to 0

Editing existing licenses

1. As above, open the **Customer->Customer Information** module.
2. Click on **Edit->Generate Web License**.
3. Click on the Existing Licenses button. A window appears, prompting, "For one specific client?".
4. Click **Yes** to select and edit the existing license of one specific client, or **No** to list existing licenses for all clients. This will create a list with one or multiple licenses.
5. To remove licenses from the list, highlight them and press the **Delete** button.
6. To edit one of the licenses, highlight it and press the **Edit** button.
7. Perform the necessary changes and press **OK**.

WARNING: All the licenses that appear in the window will be updated at the same time, so one needs to be careful when performing changes.

Web license options: (Please see ActiveWeb materials for more information)

- **Management:** Provides access to features for the management of departments, record series, and if your record center makes the option available, authorized users
- **Rotation:** This allows the user to manage their tape rotation schedules online. note that this option is no longer required if the record center manages the rotation through the record center interface.
- **Active files:** Provides access to the functionality necessary for managing "In House" files, including in_house locations and the ability to process orders and picking lists for items that are at the customer site.
- **Imaging:** Gives the ability to upload and view stored images and request imaging on demand deliveries. Note that this is not required in order to view signed delivery slips.
- **EDM:** Allows the users to manage electronic documents online.

9.2.2.19 Adding an EDC ActiveFile trial license

EDC ActiveFile licenses have to be created when a customer wants to have EDC ActiveFile installed.

1. Open the **Customer->Customer Information** module
2. Navigate to the desired customer
3. From the menu, select **Edit ->EDC ActiveFile Trial License**. A window appears.

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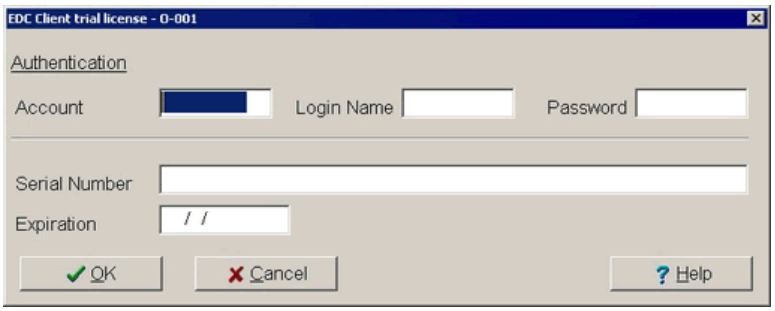


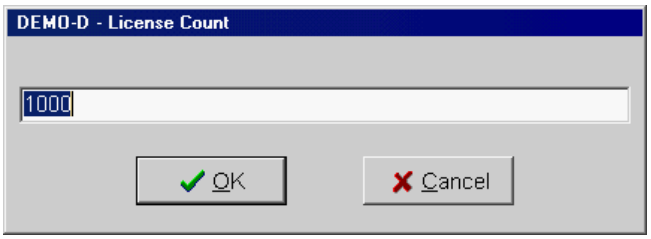
4. Enter your credentials in the Authentication fields, then press the **OK** button.
5. The software will contact DocuData and generate a serial number and an expiration date for that customer.

9.2.2.20 Editing the quantity of remote licences for a customer

Record Center / On line (Cust32.exe) is an application included with EDC RC that can be used by customers to access and modify information related to their records. It is used on the record center network, typically from within a consultation room made available to customers for indexing their boxes and preparing for auditors. (Note that it has less functionality than ActiveWeb.)

The following procedure allows you to modify the number of users authorized to access this application concurrently for a given customer

1. Open the **Customer->Customer Information** module.
2. From the menu select **Edit->Remote access license**. A window appears.



3. Enter the wanted quantity of licenses and press **OK**.

9.2.2.21 Editing a web license

Note: The standard method for managing web licenses for client access to ActiveWeb is to use the Generate a web license[281] function. However, if your server is unable to connect with DocuData's server, it is possible to enter the license manually as follows:

1. Send DocuData Software Corporation the following information:
- The customer name and number (**Customer Information** Module) ;
- The options that the license requires.

2. Open the **Customer->Customer Information** module and select **Edit->Add or update web License**
3. Enter the license number and press **OK**.

9.2.2.22 Defining the box and file fields

EDC enables you to tailor ActiveWeb to meet your customers needs. You may customize the names of fields for each customer, and if you have already customized the field names for a customer in a given industry, it is possible to copy their field definitions to other customers[288].

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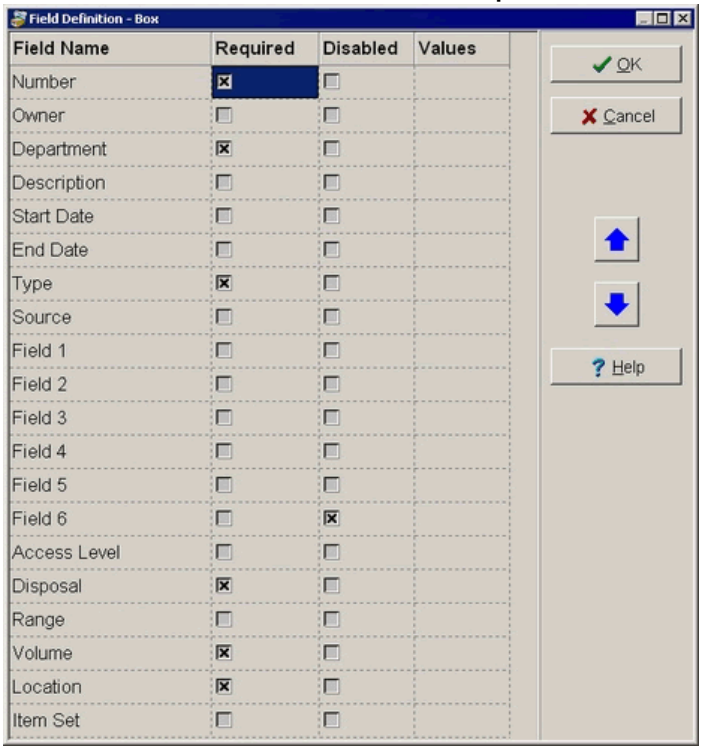
Overview of customizations possible with box and file fields:

- Changes in the names and order of fields made here will be seen by the customer on ActiveWeb.
- Required fields are labeled in red. The customer cannot proceed if the field is blank.
- Disabled fields are not displayed on ActiveWeb.
- A drop-down list of values can be created for fields

Open the field definitions box:

1. Click on **Customer->Customer Information** from the Main window.
2. Click on **Edit->Field definition -> Box | File**. A window appears.



To set fields as required
- check the Required check box beside the field.

To disable fields
- check the Disabled check box beside the field.

To set values in the drop down list for Field 1, 2 or 3
- Click on the drop down arrow of the Value field. A window appears.

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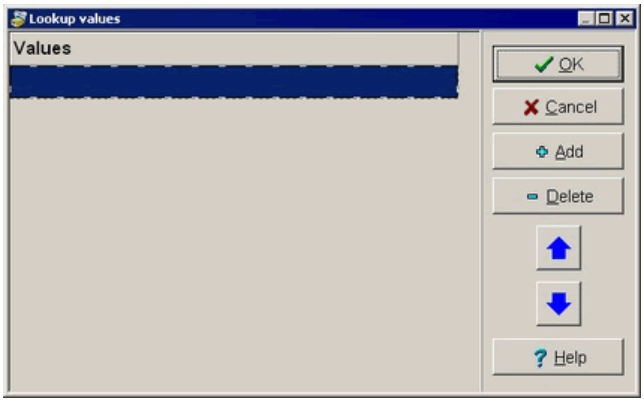

- To add a value to the list, press the **Add** button. Double-click on the field and enter the desired characters.
- To delete a value from the list, select the desired field (it will appear highlighted) and press the **Delete** button.
- To change the order of the values, select the desired value and press the **up** or **down** arrows.
- When all the changes have been performed, press **OK**.

To change the position of the field,
- Click the field name to select it.
- Press the **up** or **down** arrow until the fields is in the desired position.

To rename a field
- Double-click the field name to be changed, and enter the new one. (Note that this changes the value stored in the customer dictionary[360] in the current language.)

When all the values have been entered and all the fields have been set, press **OK**.

Additional file fields:

In addition to the fields normally visible through file module, it is possible to make additional longer metadata fields available for files.

1. Open the **Customer->Customer Information** module and navigate to the correct customer.
2. From the menu, select **Edit->Field Definitions->File**.

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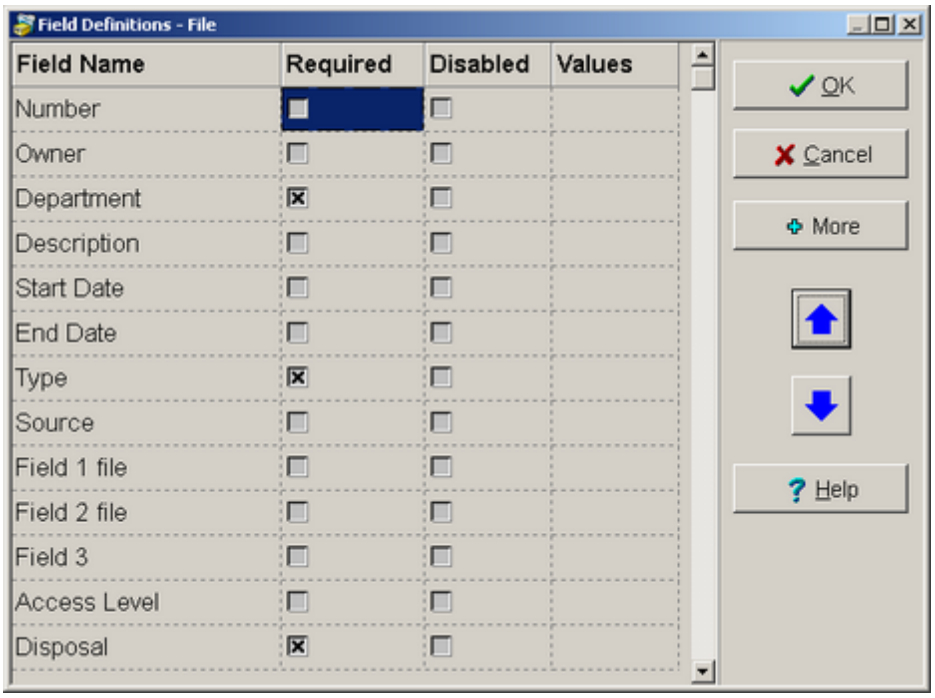
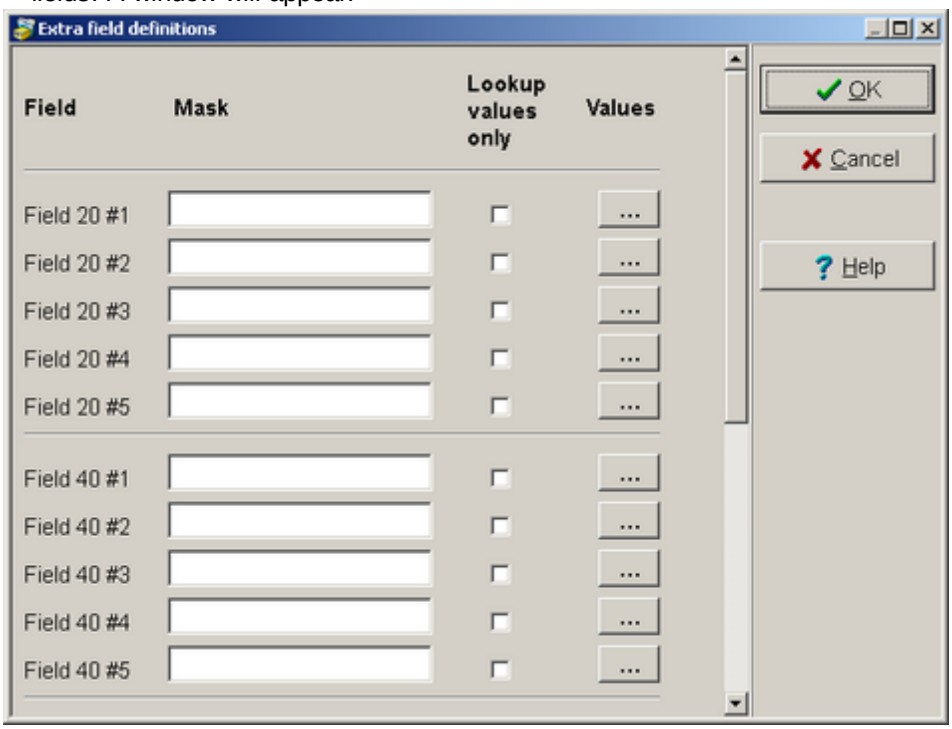


3. Click the **More** button. When done for the first time for a give customer, this will activate the extra fields. A window will appear:



- If you require a specific formatting for a field, enter a mask (e.g. "(999) 999-9 North American phone numbers), enter mask criteria[870] . Otherwise, leave this field blank.
- Click the '**...**' button associated with the field if you wish to enter look-up values for a drop-down list.
- Check the **"look-up values only"** box if this applies

4. Click "**OK**" to return to the previous field definitions window when done
5. Fields 20#1 Through 80#5 will now appear in the list, and may be enabled, renamed, and re-ordered as desired.

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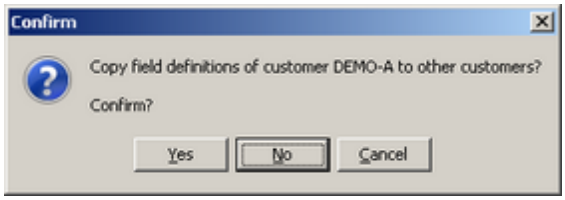
6. Click "**OK**" when done.

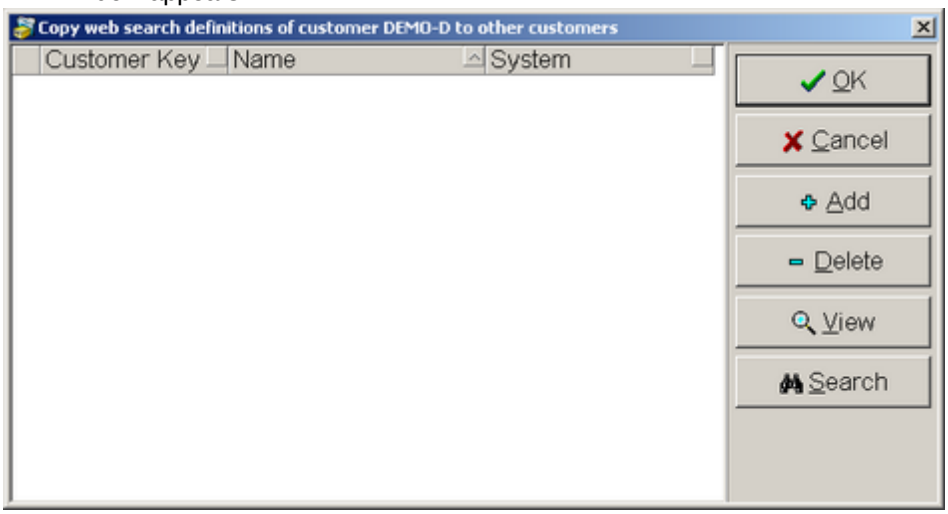
9.2.2.23 Copying field definitions or Web searches to one or more customers

Field definitions define the naming and behavior of fields for your customer on ActiveWeb. Web searches specify which searches are available to each customer. To copy these from one customer to others, you may do the following:

1. In the **Customer->Customer Information** module, navigate to the profile of the customer that you wish to copy from.
2. From the menu, select **Edit->Field definitions->Copy fields to other customers**. for field definitions or **Edit->Web Searches->Copy web search definitions to other customers**.
3. A dialogue window appears. Confirm that you are copying from the correct customer. Click **Yes** to continue.



4. A window appears.



5. Build a list of customers to include, by clicking **Add** and selecting the customers, or Clicking the **Search** button.

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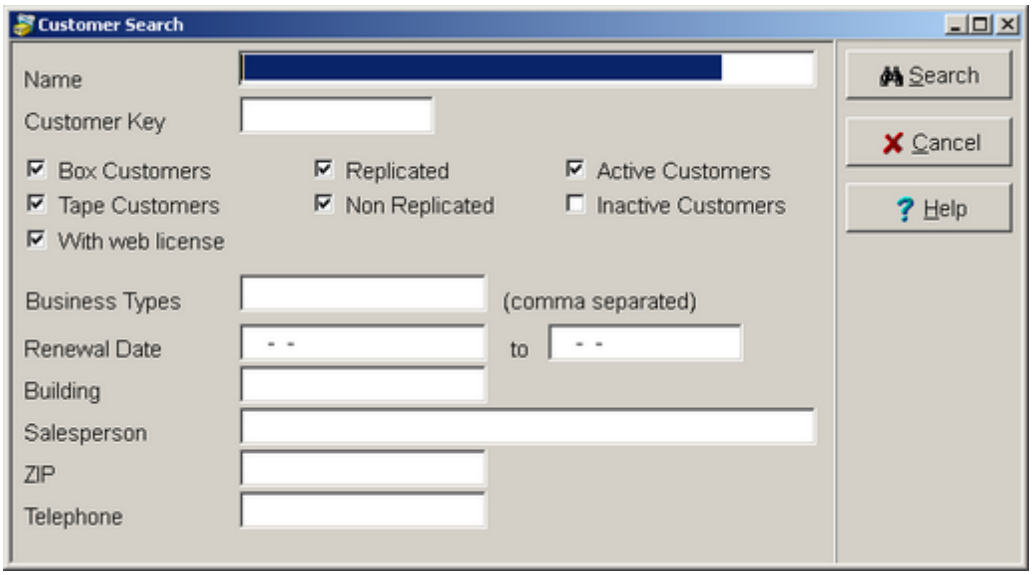

6. Once you are satisfied with the list of customers that you have built, click **OK** to continue.

The definitions or searches will be copied to the selected customers.

9.2.2.24 Editing the web search parameters

These parameters will organize the customer's list of search parameters on the web if they have an Internet access to the record center (ActiveWeb). To see which report was set by default for the web search results see the Adding, configuring or deleting default or custom reports for a customer 299 topic.

1 Click on **Customer**->**Customer Information** from the Main window.
2 Click on **Edit->Web Searches->Web Searches**. A window appears.

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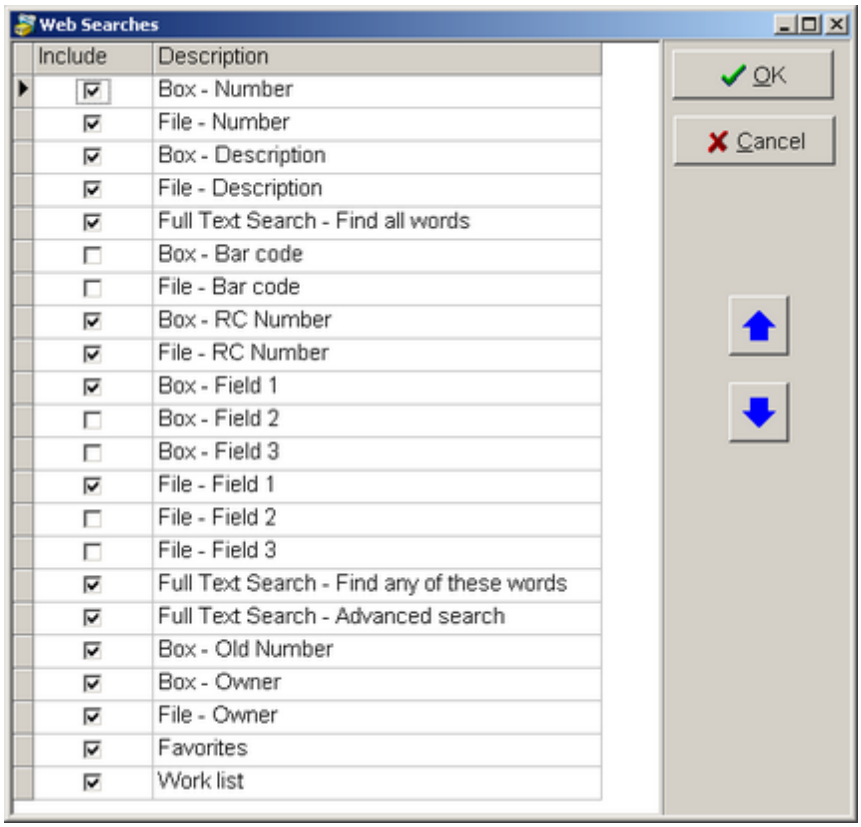

3 Edit the order or the content of the list :

- To exclude a specific field from the list, uncheck the Include check box situated beside the field description.
- To change the order of apparition of the different fields, select the field you want to move (an arrow situated at the left of the field indicates the selected field) and use the direction arrows at the right of the window to set the appropriate position.

4 When all the changes to the parameters have been done, press **OK**.

9.2.2.25 Edit web search field definitions

On ActiveWeb, the user can specify which fields appear in the search results report. These settings can also be viewed and edited in EDC RC as follows:

1. In the **Customer->Customer Information** module, from the menu select **Edit->Web Search Field Definition->Box | File | Document**. A window appears.

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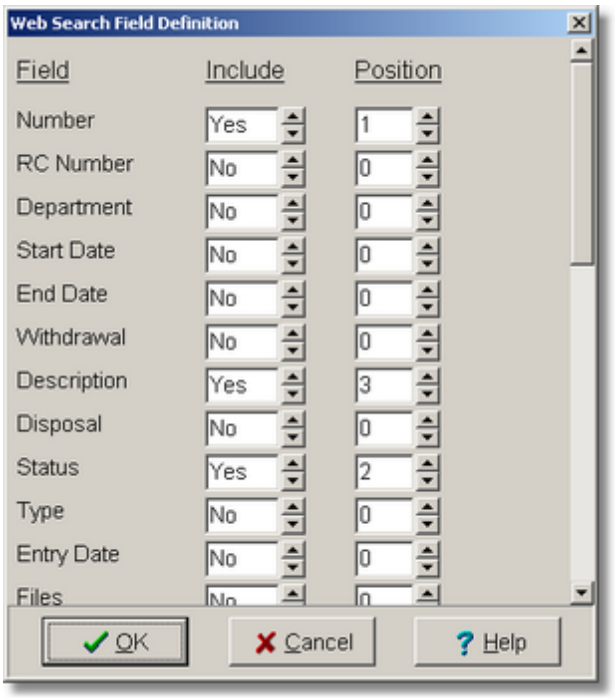
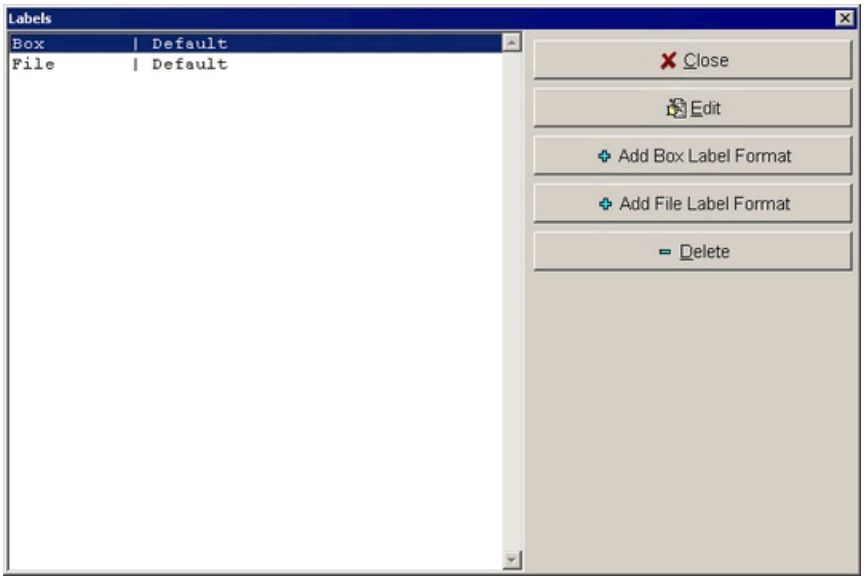


2. If you wish to include a field, set Include to Yes, and specify a position.
3. Click **Okay** to accept changes.

9.2.2.26 Customizing laser labels for a customer

This topic explains how to create label templates for each customer. The created templates will form a list that can be selected from when printing laser labels[465].

1 Click on **Customer**->**Customer Information** from the Main window.
2 Click on **Edit**->**Labels**. A window appears.



3 Click on the **Add Box Label Format** button to edit box labels or on the **Add File Label Format** button for files. The following window opens, containing also many lines where each describes a value

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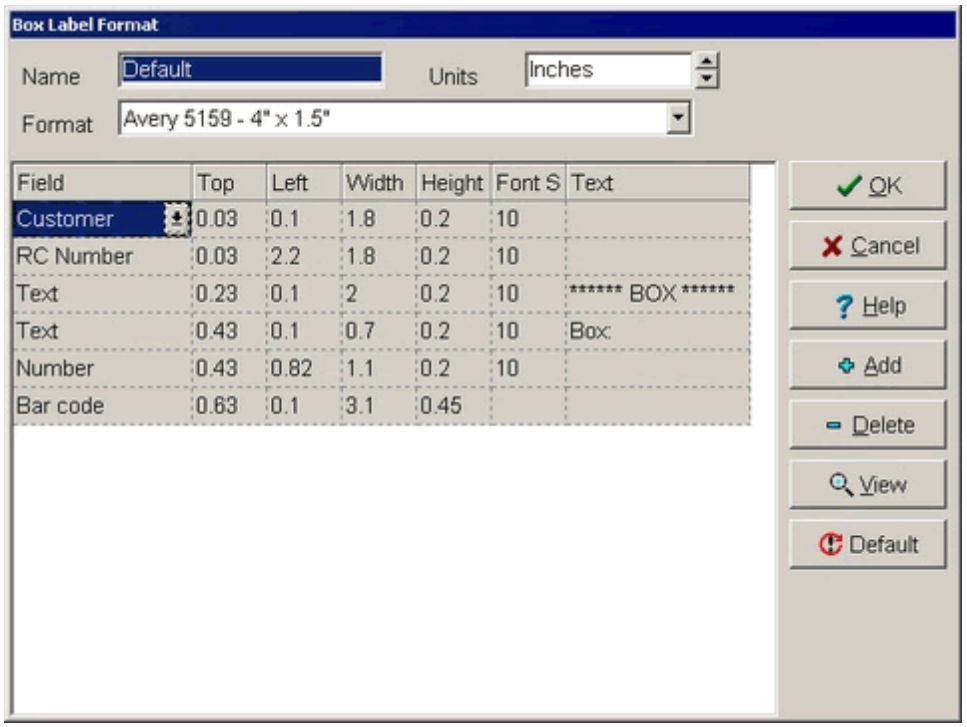
defined in the system.



4 Lines can be added or removed if desired, and their parameters can be modified. Each line represents an element on the label.

- To add an element on the label, click on the **Add** button.
- To remove an element on the label, click anywhere on the desired line and click on the **Delete** button.
- To modify element's parameters (a line's column), click on the desired parameter (column line) and change it (see step **5** below).
- To view the label's appearance, click on the **View** button. The report's window opens.

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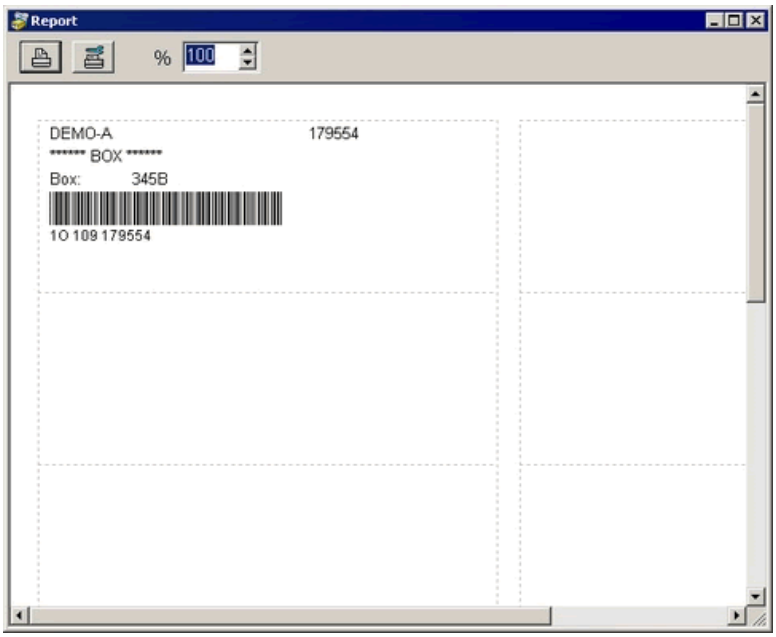

- To restore the system's default values, click on the **Default** button.

5 Here is a description of the parameters that can be set for every element of the label (columns in the window shown in step **3**).

- Field : click on the drop-down button and select the field to include on the label.
- Top : indicate the distance between the element and the top side of the label.
- Left : indicate the distance between the element and the left side of the label
- Width : indicate the width that the element will take up on the label. Characters that do not fit within the width will not appear.
- Height : indicate the height that the element will take up on the label. If the font size is too large, the text will not appear.
- Font size : indicate the point size of the text shown on the element.
- Text : effective only if "Text" has been selected as a field type. Allows to specify the text that will appear on all labels.

6 Click on the **Accept** button from the window shown in step **3**.
7 Click on the **Close** button from the window shown in step **2**.

Note : The Units field from the window shown in step **3** allows to select inches or centimeters as the unit for elements on the label. Then it is important to double-check the unit before entering numeric values.

Related topic :

Avery label formats available 293

9.2.2.26.1 Avery label formats available

LETTER FORMAT

Number	Width (" / cm)	Height (" / cm)	Columns x Rows

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Avery 5095	3,38 / 8,59	2,33 / 5,92	2 x 4
Avery 5159	4,02 / 10,2	1,52 / 3,85	2 x 7
Avery 5161	4 / 10,16	1 / 2,54	2 x 10
Avery 5162	4/ 10,16	1,33 / 3,38	2 x 7
Avery 5163	4 / 10,16	2 / 5,08	2 x 5
Avery 5164	4 / 10,16	3,33 / 8,46	2 x 3
Avery 5165	8,5 / 21,59	11 / 27,94	1 x 1
Avery 5095	4 / 10,16	1,5 / 3,81	2 x 6
Avery 5159	3,5 / 8,89	1,67 / 4,24	2 x 6
Avery 5161	3,06 / 7,77	1,83 / 4,65	2 x 5

A4 FORMAT

Number	Width (cm)	Height (cm)	
L7159	6.4	3.39	
L7160	6.35	3.81	
L7161	6.35	4.66	
L7162	9.9	3.39	
L7163	9.9	3.81	
L7164	6.35	7.2	
L7165	9.9	6.77	
L7166	9.9	9.31	
L7167	19.96	28.9	
L7168	19.96	14.35	
L7169	13.9	9.91	
L7170	13.4	1.1	
L7172	10	3	
L7173	9.9	5.7	

9.2.2.27 Adding, editing or viewing the signing officer for a customer

The signing officer is the person whose signature will be required for authorization of disposal lists printed by the record center. When no signing officer has been defined, the creator of a disposal list becomes responsible for its authorization.

- To view the signing officer :

1. From the **Customer->Customer Information** module, select **View->Signing Officer**. A window appears.

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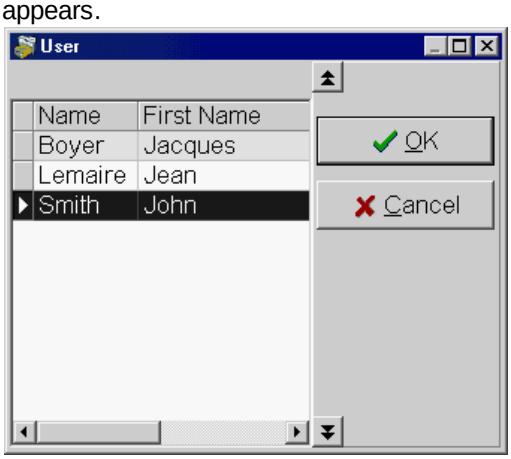
- To assign a signing officer :

1. From the **Customer->Customer Information** module, select **Edit->Signing Officer**. A window appears.



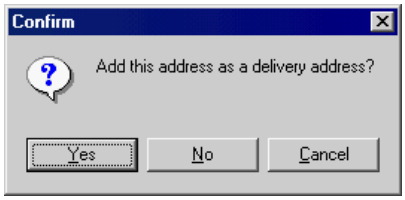
2. Select a user and press **OK**.

Note that rights to authorize disposal lists on ActiveWeb are assigned using the List signing officer[304] field in the **Customer->Authorized User** module.

9.2.2.28 Adding the default address of a customer for delivery

When creating a new customer, the main address is generally entered in the current module. In order to save some time, this function adds the address automatically in the list of addresses in the Delivery Address module.

1. Click on **Customer->Customer Information** from the Main window.
2. Click on **Edit->Add Default Delivery Address**. A dialog box appears.



3. Click on the **Yes** button to confirm the operation. The address will be displayed in the **Delivery Addresses** module, if an identical address does not already exist for this customer.

9.2.2.29 Adding, viewing or editing ordering notes

1. Click on **Customer**->**Customer Information** from the Main window.
2. Select the wanted customer. Click on **Edit ->Ordering notes**.
3. A window appears.

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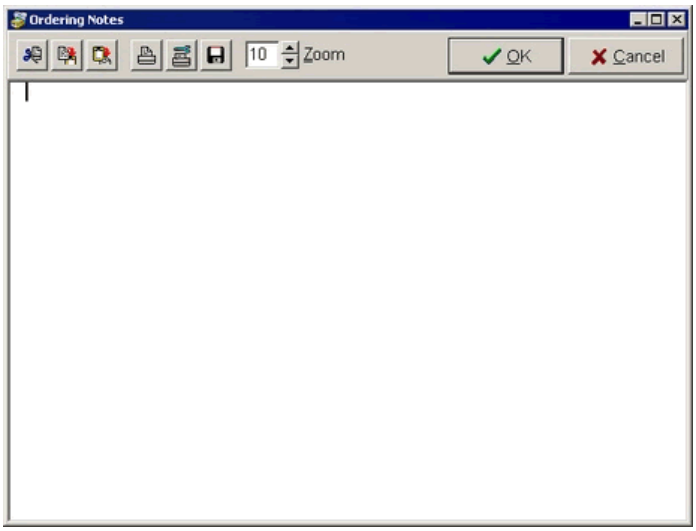


4. Enter, modify or view the wanted information. Press **OK**.

9.2.2.30 Adding customer invoice notes

Invoices provide a useful means of communicating with customers. EDC provides mechanisms for three types of notes. These appear near the bottom of the invoice, in the following order:

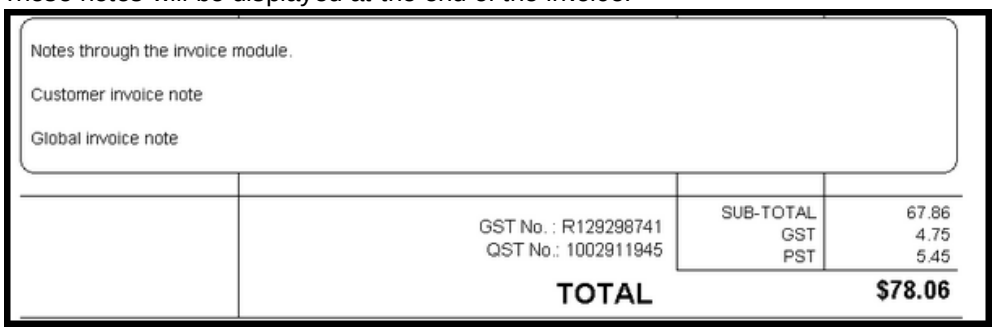
1. Notes, through the **Accounting->Invoice module**, appear on a single invoice.
2. Invoice note, through **Customer->Customer Information module**, appears on all invoices for a customer.
3. Global invoice note, through **Management->System Information module.** Global invoice notes will appear at the bottom of all invoices for which the option to display this note is not deselected in the Invoicing[699] module.

On a given invoice, it is possible to specify whether or not the customer and global notes are displayed.

To add a note to appear for a customer:

1. Open the **Customer->Customer Information** module, and navigate to the correct customer.
2. From the menu, select **Edit->Invoice Note**.
3. In the box that appears, enter your note, then click **OK**.

These notes will be displayed at the end of the invoice.



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9.2.2.31 Editing the customer invoice template

For a given customer, if the Legacy Invoice[254] setting is set to **No** in the Customer->Customer Information module, the system will format the customer's invoice using a customizable report rather than using the standard invoice layout.

Custom layouts can defined per customer. If there is none defined for the customer[297], the system will use the default template defined for the record center[380].
(Note that you can modify an individual invoice[710] to print it, but this format may not be saved.)

To edit the customer's invoice template:

1. Open the **Customer->Customer Information** module
2. Navigate to the desired customer
3. From the menu, select **Edit->Invoice template**
4. A dialogue prompts, "Use this invoice for the template".
- If you have an invoice that you would like to start with, enter its number and click **Okay**.
- Otherwise, click **Cancel**.
5. The invoice layout appears. Modify the invoice layout[710] as desired.
6. Close the invoice layout window when done. If you have made changes, the system will prompts, "Save Changes?"
7. Click "**Yes**" to save changes.

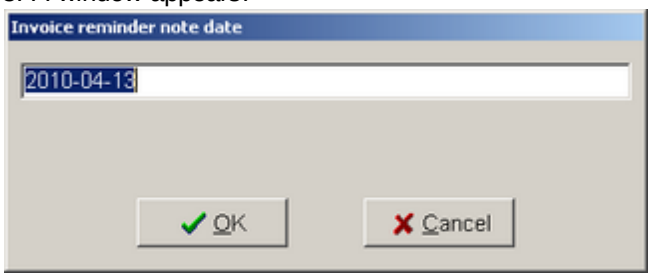
The changes will be apparent on any invoice for which the customer invoice applies.

9.2.2.32 Adding, viewing or editing invoice notes for a customer

Adding or editing reminder invoice notes

These notes appear after an invoice creation run.
Each note is associated with a customer and a date. Once that date is current or past, the note will be displayed in a modal box after invoice creation for this particular customer. These notes are usually put in to remind you to add or modify certain charges on the invoice for this customer. For example, for a past-due payment charge, or if you have a one-time promotion for this customer.

1. Click on **Customer**->**Customer Information** from the Main window.
2. Select the desired customer. Click on **Edit ->Invoice reminder notes**.
3. A window appears.



4. Enter a date in the field and press **OK.** If this date is current or past during invoice creation, the note will be displayed after the creation.
5. A window appears.

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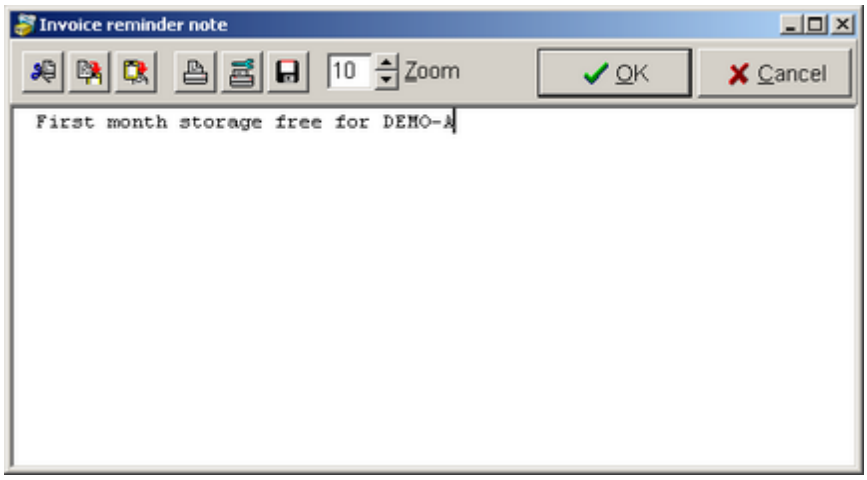
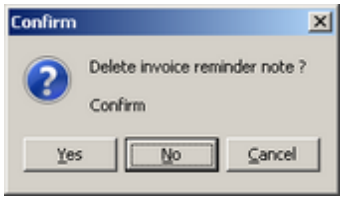


6. Enter the notes in the field and press **OK**. The notes will automatically be added for this customer.

Deleting invoice reminder notes

1. Click on **Customer**->**Customer Information** from the Main window.
2. Select the wanted customer. Click on **Edit ->Delete Invoice reminder notes**.
3. A window appears.

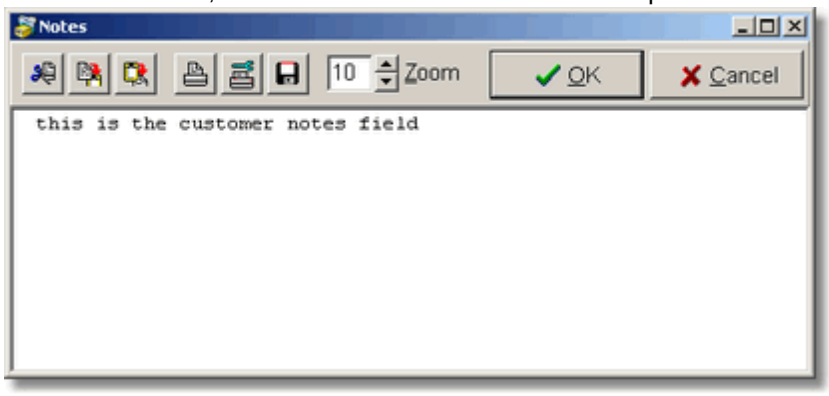


- To confirm the deletion of the notes, press Yes.
- To cancel the deletion of the invoice notes, press No or Cancel.

9.2.2.33 Adding, viewing or editing general notes for a customer

These notes are useful for storing general information about a customer.

1. Open the **Customer->Customer Information** module.
2. Navigate to the correct customer.
3. From the menu, select **Edit ->Notes** or hold **Ctrl** and press **N**. A window appears.



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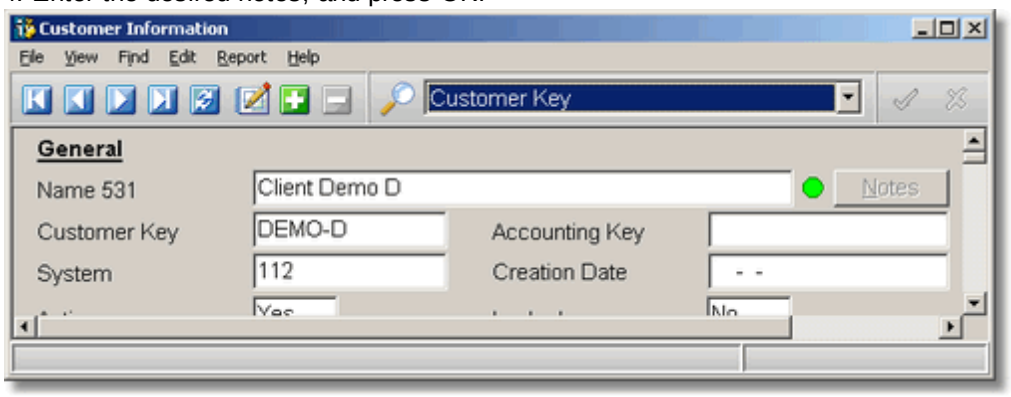
4. Enter the desired notes, and press OK.



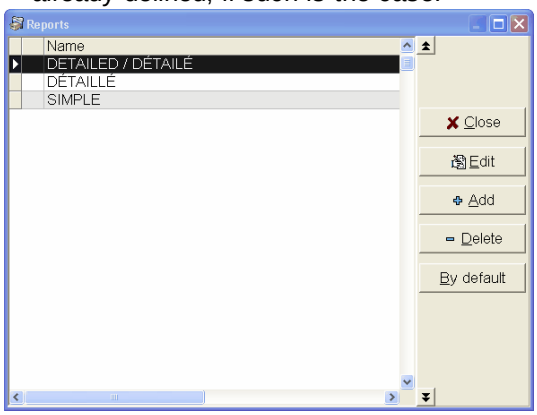
The presence of notes is indicated by a green dot beside the Notes button.
(Notes can also be edited while in edit mode by pressing this button. They can be viewed without edit access while in browse mode by pressing F4.)

9.2.2.34 Adding, configuring or deleting default or custom reports for a customer

It is necessary to specify which information will be displayed on the box and file lists, and their tabulation order. It is also possible to define a report as the one used by default.

Note : Usually, some pre-defined reports are granted to a customer when he is being created in the system. The reports in question have been defined in the System Information[386] module. The current operation allows to edit these reports or to add new reports to the list of available reports.

1. Click on **Customer**->**Customer Information** from the Main window.
2. Click on **Report**->**Box Report Fields**|**File Report Fields**. A window appears and contains the reports already defined, if such is the case.



3. Perform one of the following operations :

- To delete a predefined report, select it and click on the **Delete** button.
- To create or modify a predefined report, select it and click respectively on the **Add** or the **Edit** button. A window appears. When adding a new report it is empty but contains the settings already entered for a predefined report that has to be modified.

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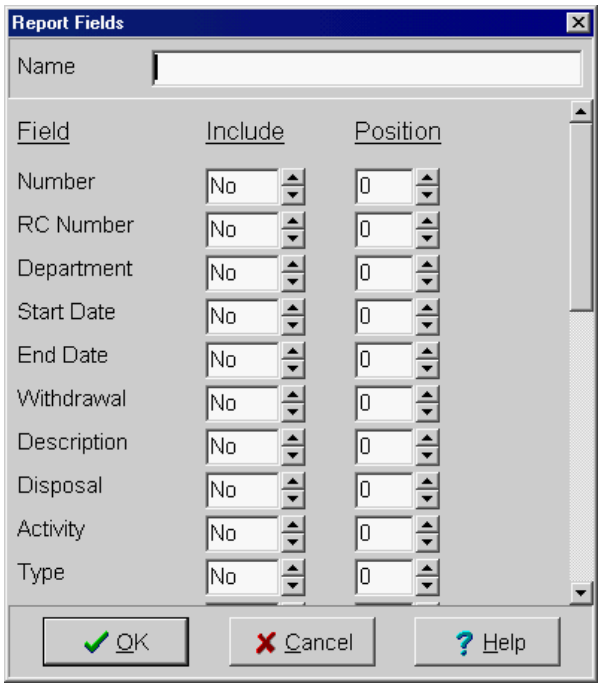


Enter or modify the name of the report then click on the choice buttons in the Include column and set to "Yes" the fields that must appear on the report. After, click on the choice button in the Position column to set the tabulation order of the fields on the report. Press **OK** when all the modifications have been made. The window opened in **2** reappears.

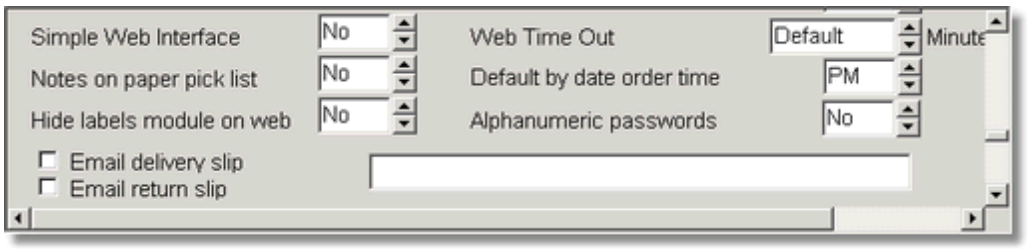
4. Select a report and click on the **By default** button to set this report as the default one. A small mark will appears on the left of this report.

Note : The default report is the one that will be displayed or printed when producing reports, unless choosing another report or setting different fields with the Report Options menu of the module concerned.

5. Click on the **Close** button to save changes.

9.2.2.35 Emailing the delivery & return slips

When the Email delivery slip box is checked in the **Customer->Customer Information** module, upon delivery creation:
1. The delivery slip will be e-mailed to the address in the adjacent field
2. Order item confirmation will be sent to the e-mail addresses of the authorized users who ordered them.



If the Email return slip box is checked, the return slip will be emailed to the adjacent email address when the delivery is returned.

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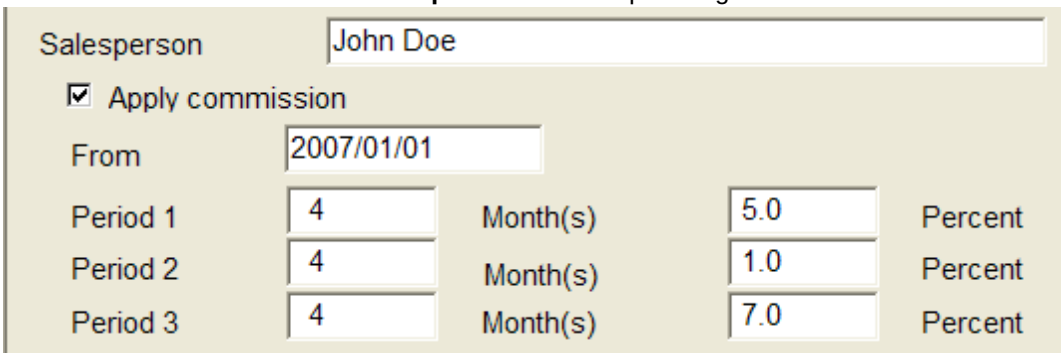
9.2.2.36 Enabling and viewing Sales Commissions

EDC can be set up to automatically create sales commission reports in the following way:

Set up the customer on whom to apply commissions

1. Open the **Customer->Customer Information** module
2. Specify the Salesperson responsible for the sale
3. Check the Apply commission box.
4. Specify the start date for commissions
5. Specify the duration of each period, and the percentage commission to apply
6. Press **Ctrl-Enter** or click the **Accept** button to accept changes.



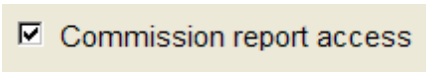
Indicate which goods and services are subject to commission

1. In the **Accounting->General Pricing | Customer Pricing** module, navigate to the appropriate price code.
2. Click the **Edit** button or press **Ctrl-E** to switch to edit mode.
3. Set the Apply commission field to Yes or No as appropriate.
4. Press **Ctrl-Enter** or click the **Accept** button to accept changes.

Note: Values in general pricing may be overridden in the **Accounting->Customer pricing** module.

Grant employees access to the Commissions Report

1. In the Management->Employee module, navigate to the appropriate employee
2. Place a check mark in the **Commission report access** box.
3. Press **Ctrl-Enter** or click the **Accept** button to accept changes.



(Note that the employee will also require scroll-access[340] to the Invoicing module.)

View the commission report

1. In the **Accounting->Invoicing** module, select **File->Commission Report**. A window appears.

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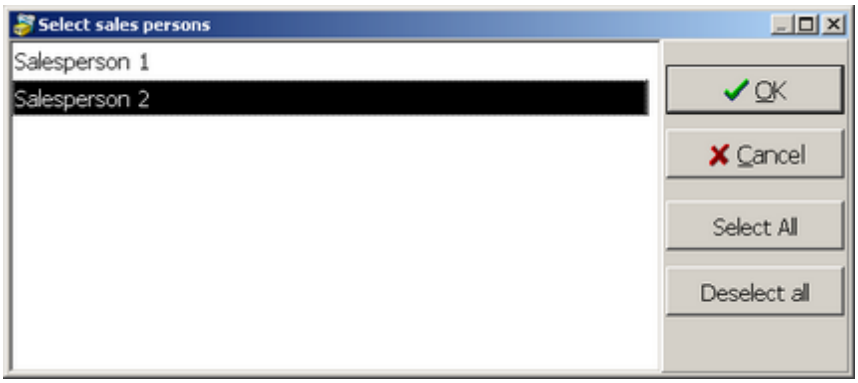


2. Select the salespeople for whom you wish to view commissions, then press **Enter** or click **OK**.
3. Enter the range of invoice dates over which you wish to view commissions, then press **Enter** or click **OK**.
4. The system will produce a report listing the sales people, commissioned sales totals and commissions per account, and total commissioned sales and commissions per salesperson.

Related topics

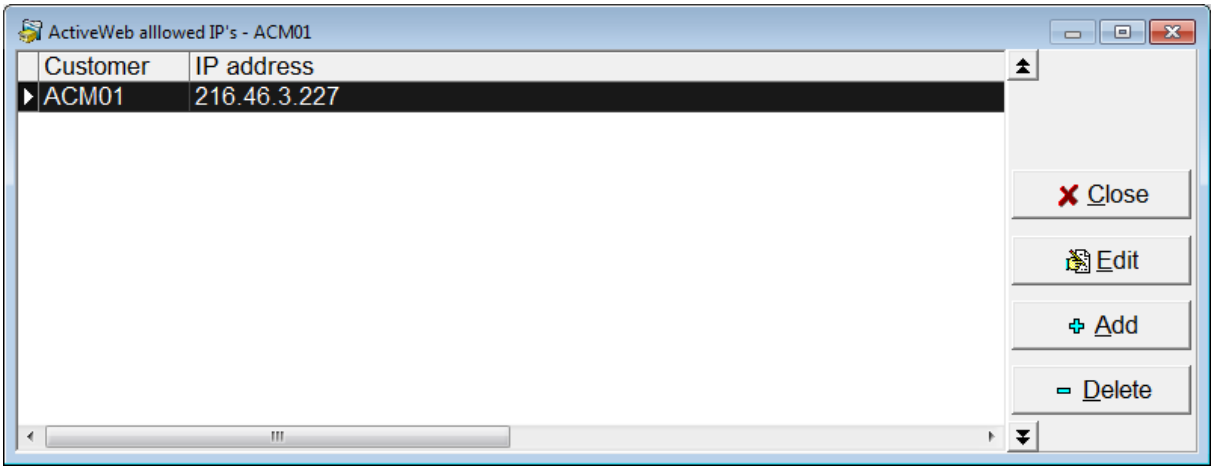
Viewing commission reports 705

9.2.2.37 Limiting IP addresses from which a client can access ActiveWeb

By limiting the IP addresses from which a client can access ActiveWeb, you can give a client additional protection by permitting them to log into their ActiveWeb account from their office but not for example coffee shops. This works well for clients that have fixed IP addresses. Clients can determine their IP address by opening a web browser and searching for "What is my IP address?"

To establish the IP addresses from which an account can log in:

1. Open the **Customer->Customer Information** module and navigate to the correct account.
2. From the menu, select **Edit->ActiveWeb Allowed IPs**.



3. Click the **Add** button to add IP addresses.
4. Click the **Close** button when done.

Note that if no IP address is present for an account, the filter does not apply and clients can log in from

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any address.

9.2.3 Authorized User

9.2.3.1 Overview (Authorized Users)

Only authorized users may use ActiveWeb or EDC ActiveFile, or place orders over the phone. This module lets you create new authorized users and configure their specific settings and access rights.

Available reports

- List of authorized users, for current customer or for all

Fields[304] (see the next section)

Tasks

- Adding or editing a user[306]
- Adding or editing access rights for a user[306]
- Deleting a user[310]
- Editing or viewing the password of a user[308]
- Viewing or printing the list of users[311]
- Re-enabling access for a user[312]

Distinctive menu options:

File menu

- Export user rights to CSV[308]

Edit menu

- Web licenses[309]
- Password[308]
- Web search fields definition (box, file, document)[311]

Module window:

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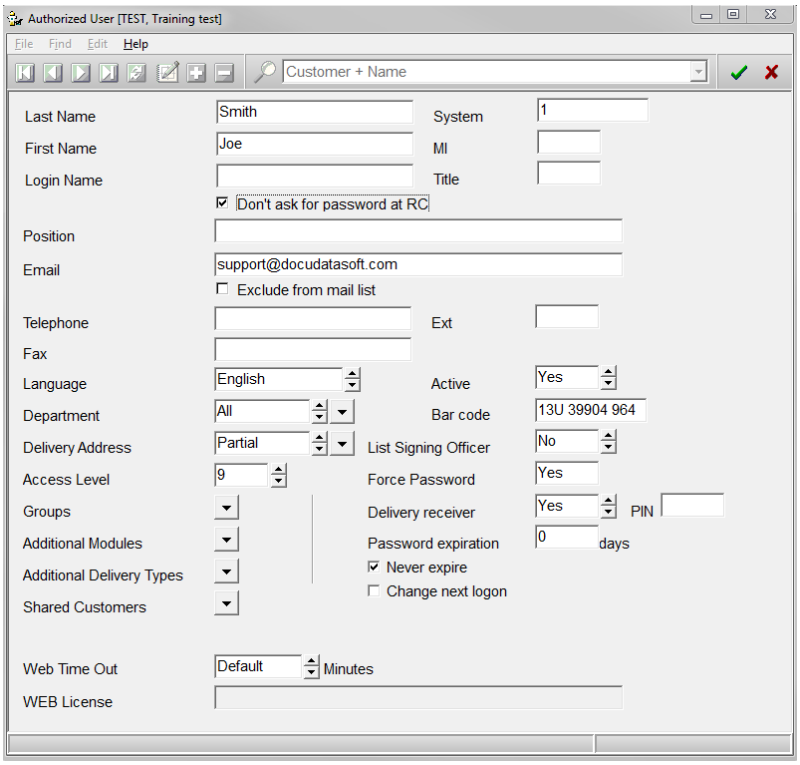

9.2.3.2 Fields (Authorized Users)

Name, First Name, MI, Title, Telephone and EXT
Contact information for the user (MI : Middle Initial; EXT : Extension; Title: Up to 6 characters. egg. Dr, Sir).

System
Number given to the user by the system and used by the record center.

Login Name
This field is mandatory when EDC ActiveFile Software is installed at the customer's site. It is mainly used by the software to authenticate orders that are passed between EDC ActiveFile and EDC RC. It is also possible to log in by using the e-mail address of an authorized user.

Don't ask for password at RC
When this option is selected, the system will not prompt for a password for this user when an order is placed through the Orders->Order module. The password is still required for use of ActiveWeb.

Position
The role of a user within an organization. (E.g. receptionist, head nurse, C.E.O.)

Email
Field that allows to enter the email address of the user. This address is particularly used to advise the user when scanned images (Imaging On Demand[635] module) are available for consultation. The e-mail address may also be used instead of a login name for ActiveWeb. Note that if two user profiles for the same customer account have the same e-mail address, only the one with the lower system number will be permitted to log in this way.

Exclude from mail list

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When checked, this e-mail address would not be included if you were to use Send batch emails[269]

Fax

This field is included on the delivery slip below the customer address when the ship mode of the delivery is Fax.

Language
Choice field containing "English" or "French" (or both languages used by the record center).
This is the language used by ActiveWeb once the user logs in.

Active
Choice field containing "Yes" or "No".
This field indicates if this user still has access to the system and can place orders with the record center. When the value of this field is "No", the user will no longer appear in the choice list of users when placing orders.

Department
Choice field containing "None", "Partial" or "All".
This field gives access to the selected departments. When this field contains "Partial", it is possible to click on the drop-down button and to add or delete individual departments from the selection list.

Bar code
System-create bar code text that could be used for identifying the authorized user in ActiveFile.

Delivery Address
Choice field containing "None", "Partial" or "All".
It gives access to the selected delivery addresses. When this field contains "Partial", it is possible to click on the drop-down button to add or delete individual delivery addresses.

List Signing Officer
Choice field containing "Yes" or "No".
This field allows to indicate if the user can sign disposal lists and authorize the record center to proceed to their treatment.

Access level[966]
Choice field containing values "0" to "9". The value "9" gives access to all documents. Documents accessible to all users within a department are assigned the value "0". To use the ActiveWeb set-up wizard, the user will require an access level of 9.

Force Password
Choice field containing "Yes" or "No".
When this field is set to "Yes", it means that the user has to give a password when communicating with the record center to place orders.

Note : This field has no effect when the value of the Force Password field in the Customer Information module is set to "Yes".

Groups
Drop-down field associated to a list defined in the User Group module.
In order to speed up work when adding new users, it is possible to define access profiles by assigning access rights to modules for groups. When creating or editing a user, simply select a specific group to give him access to that group's privileges.

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Delivery receiver
An authorized user may be identified as a delivery receiver. They may have rights to order items or access ActiveWeb, but this is not necessary. If an account has specified delivery receivers, their names are listed at the bottom of the delivery slip. Items must be delivered to one of these individuals and to no one else. They will be listed as potential receivers in rcMobile.

If the user as a **PIN** number assigned, then they will be required to enter this number when receiving a delivery, in order to confirm their identity.

Additional Modules
Drop-down field associated with a list of modules potentially accessible to authorized users. Access rights assigned using this list supplement those assigned to the user groups that a user belongs to.

Password expiration
This field allows to set an expiration delay for the password. It is also possible to check off a box, in order to indicate that the password will **never expire** or that it will have to be at the **next logon** use.

Additional Delivery Types
Drop-down field listing delivery types available to the customer.
Access rights assigned using this list supplement those assigned to the user groups that a user belongs to.

Shared Customers
Drop-down field listing other record centers acting as RIMS Link points of service[111] (service record centers). The user should exist with the same login and password at the other record centers.

Web Time Out
Numeric field determines how many minutes a web connection can remain inactive before the session is automatically terminated for security reasons, after a warning message is ignored. The value can also be set to 'default' (which is typically 15 minutes). It can also be specified for individual users in the Authorized User module .

Web License
The web access options available with this login. To change this, see Editing web license allocations for an account[309] .

9.2.3.3 Adding or editing a user

1. Click on **Customer->Authorized User** from the Main window.
2. Perform one of the following operations :
- To add a user, click on the **Add** button.
- To edit a user, select the user and click on the **Edit** button.
3. Enter information in appropriate fields (see the fields[304] section for more details).
4. Click on the **Accept** button when finished.

9.2.3.4 Adding or editing access rights for a user

Consult the fields' descriptions[304] to have an outline of the access rights that can be defined for a user.

1. Click on **Customer**->**Authorized User** from the Main window.
2. Search for the desired user. When he/she is displayed on the screen click on **Edit**->**Edit**.
3. Move to the Access Level[304] field and set a numeric value.
4. Move to the Department field and select a value with the choice button. If "Partial" is selected, click on

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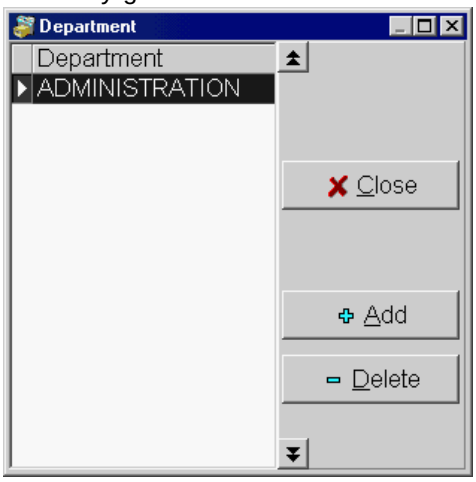
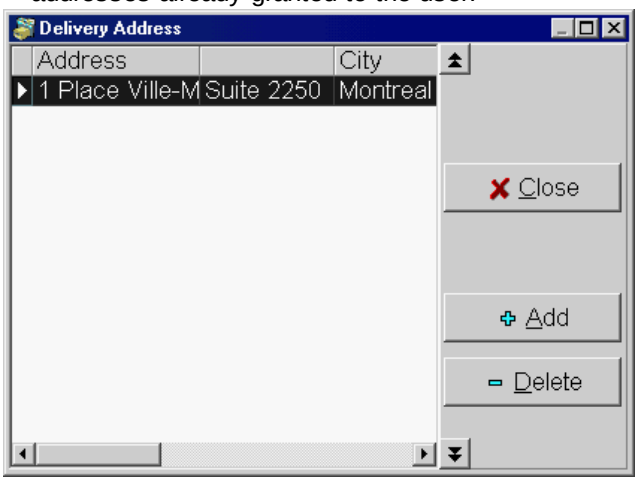
the drop-down button to view a choice list of departments. A window appears, containing departments already granted to the user.



5. Perform one of the following operations :

- To remove access to a department, select it and click on the **Delete** button.
- To add access to a department, click on the **Add** button. The list of departments appears. Select a department on the list and press **OK**. The selected department appears in the window opened in **4**.

6. Move to the Delivery Address field and select a value with the choice button. If "Partial" is selected, click on the drop-down button to view a choice list. A window appears, containing the delivery addresses already granted to the user.



7. Perform one of the following operations :

- To remove access to an address, select it and click on the **Delete** button.
- To give access to an address, click on the **Add** button. The list of addresses appears. Select a department in the list and press **OK**. The selected address appears in the window opened in **4**.

8. Move to the fields Groups , Additional modules and Additional Delivery Types and click on the choice buttons. Proceed as for departments and addresses to add or remove access rights.
9. Click on the **Accept** button when finished.

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9.2.3.5 Exporting user rights to a spreadsheet

In order to help customers of record center customers to review and update the rights of their users, EDC RC enables you to export a listing of these access rights to a simple text-based spreadsheet format (CSV, or Comma Separated Value).

This data is structured to make it easy to filter for different types of information, for example to see which authorized users have rights to access a given module or delivery address.

1. Click on **Customer**->**Authorized User** from the Main window.
2. From the menu, select **File->Export user rights to CSV**.
3. A dialogue window appears. Type the customer key and press **enter**, or press enter to select the customer from a list.
4. Click **No** to not include inactive users.
5. A "Save As" window appears. Specify the name and location for saving the file.
6. This file can now be viewed and processed with a spreadsheet application.

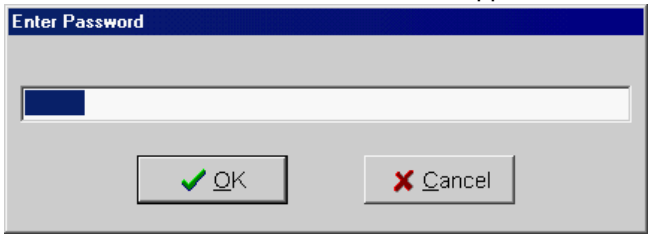
This listing includes:

- Module access rights
- Delivery Addresses
- Delivery Types
- Access level (0-9)
- Active (Y/N)
- Login name, e-mail address, and phone number

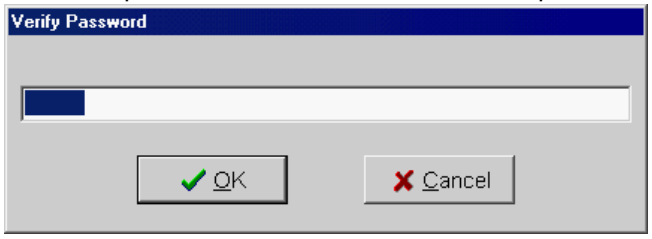
9.2.3.6 Editing the password of a user

Editing password
(Note that it is no longer possible to view a user's password.)

1. Click on **Customer**->**Authorized User** from the Main window.
2. Search for the desired user and keep him on the screen.
3. Click on **Edit**->**Password**. A window appears.



4. Enter a password of 6 to 18 characters and press **OK**. A new window appears.



5. Enter again the password and press **OK**.

Note : When a password is defined, the user must give it to the record center, when placing orders, even if the value of the Force Password fields in the Customer Information or Authorized User modules is

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"No". To remove this option, it is necessary to erase the password and set to "No" the Force Password fields in the Customer Information and Authorized User modules. A password can be deleted when performing the current operation without entering a value at steps **4** and **5**.

9.2.3.7 Editing web licence allocations for an account

Active web has core functionality, and it also has add-on modules. The core functionality available in the base license enables users with the correct permissions to:

- Perform searches and view boxes and files
- Manage boxes and files, included
- Place orders
- View reports, including imaged delivery slips

The following options are also available:

- **Management**: Manage users, departments, record series, disposal lists.
- **Rotation**: Manage tape rotation dates.
- **Imaging**: View and process images associated to files.
- **Active**: Manage in-house files, create in-house locations, picking lists, disposal lists
- **EDM**: Electronic document management. Manage documents and folders associated to files.

Because a given account may have different users with different needs, EDC allows you to create licenses with different options.

To associate web license types to users:

1. Open the **Customer->Authorized User** module.
2. From the menu, select **Edit->Web Licenses**.
3. Type the **customer key** and press **Enter**, or press Enter and select the customer from a list. A window with a list of users for the specified customer will appear.

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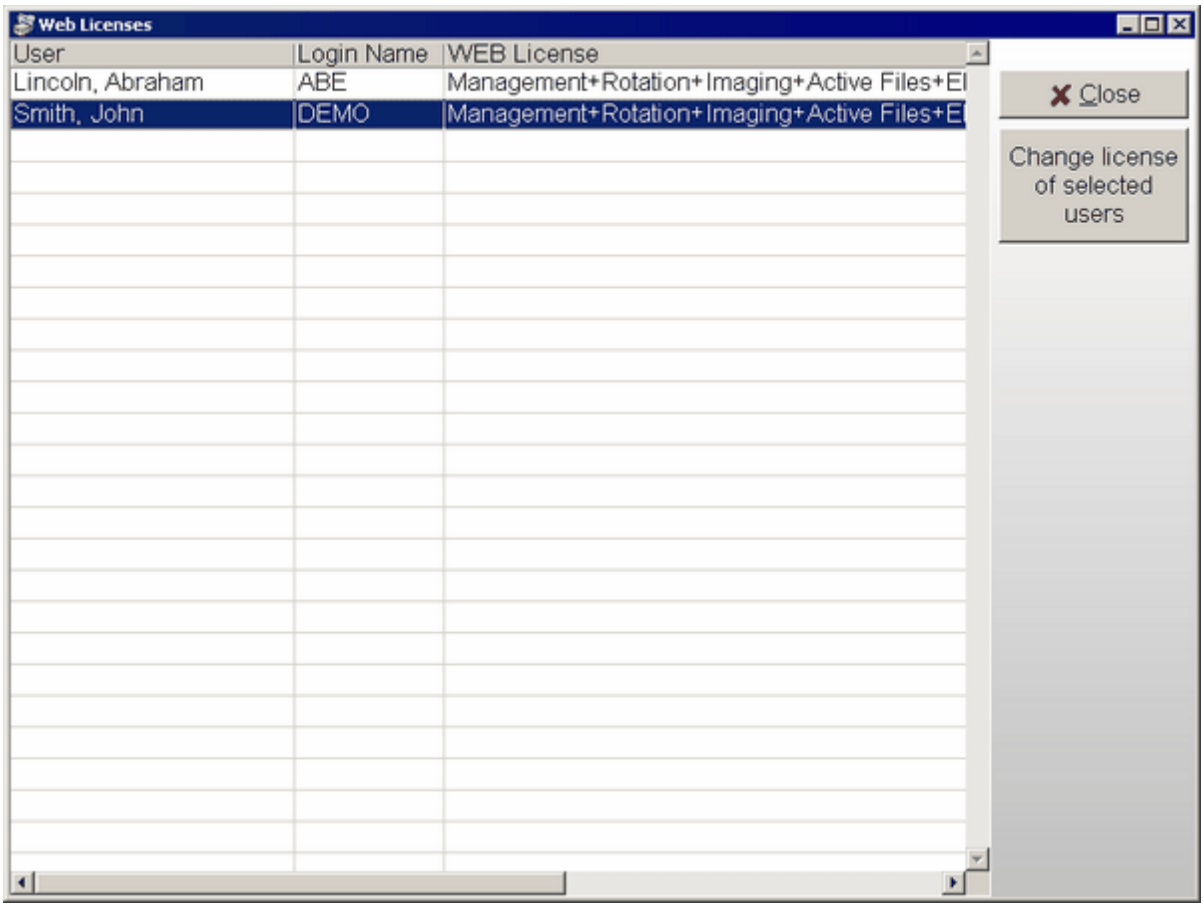
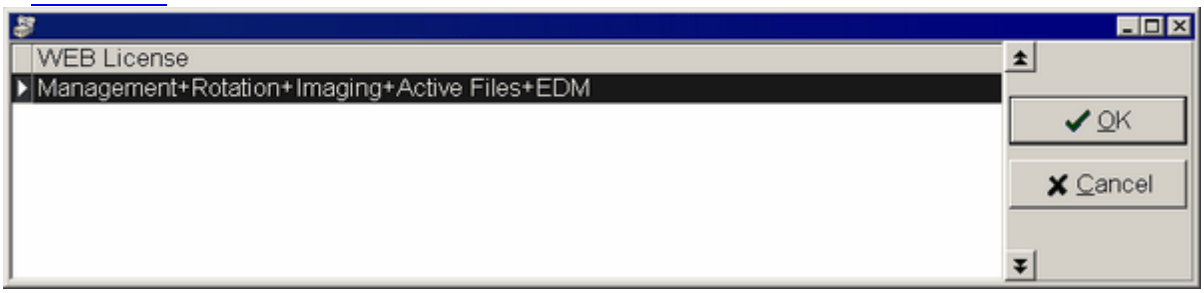


4. Select one or more users, and click "**Change license of selected users**". A list of available license configurations will appear. (If the desired license does not appear, you may have to generate a new web license[281].



5. Select the desired license and click **OK**. This license will be associated to the selected users.

9.2.3.8 Deleting a user

To delete a user, it is only necessary to set him as inactive.

1. Click on **Customer**->**Authorized User** from the Main window.
2. Search for the desired user and when he is displayed on the screen click on **Edit**->**Edit**.
3. Move to the Active field and set it to "No".

As soon as a user is deactivated, his name will not appear anymore in choice lists of users (ex: when placing an order in the Orders module.)

Note that authorized users cannot be made inactive while they have remaining recurring orders.

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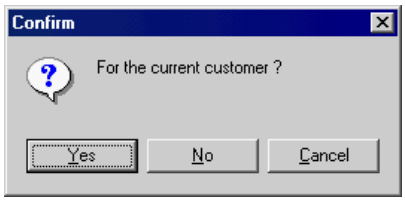
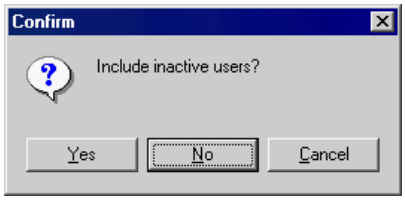
9.2.3.9 Viewing or printing the list of users

1 Click on **Customer**->**Authorized User** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. A dialog box appears.



3 Click on the **Yes** button to produce a report only for the current customer or click on the **No** button to produce a report including all customers of the record center. Another dialog box appears.

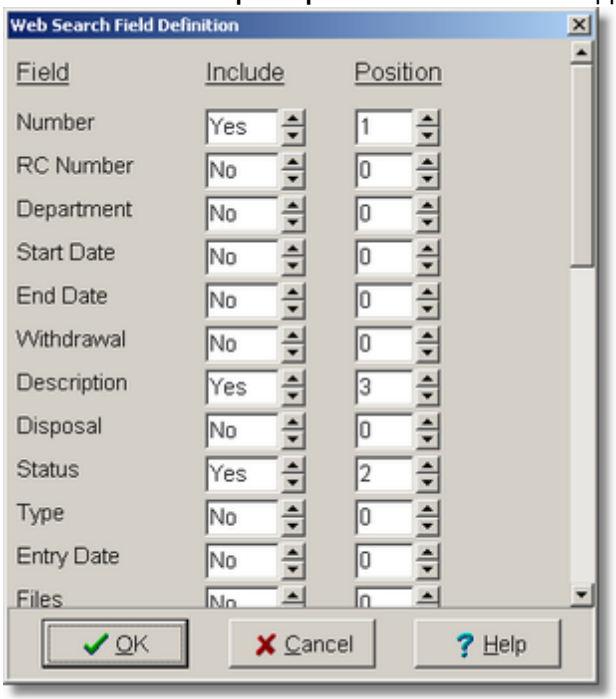


4 Click on the **Yes** button if the inactive users must be included in the report. Soon after, the report is printed or displayed.

9.2.3.10 Modify user web search definitions

On ActiveWeb, the user can specify which fields appear in the summary list of search results. These settings can also be viewed and edited in EDC RC as follows:

1. In the **Customer->Authorized User** module, from the menu select **Edit->Web Search Field Definition->Box | File | Document**. A window appears.



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2. If you wish to include a field, set Include to Yes, and specify a position.
3. Click **Okay** to accept changes.

9.2.3.11 Re-enabling access for a user

Entering incorrect passwords ten times within ten minutes causes an authorized user's profile to be made inactive.

To re-enable access:
1. Open the **Customer->Authorized User** module.
2. Navigate to the correct user.
3. Press **Ctrl-E**, or click the edit button.
4. Set the **Active** [305] field to **Yes**.
5. Press Ctrl-Enter or click the green check mark to accept
6. Change the user's password [308] if necessary.

9.2.4 User Group

9.2.4.1 Overview (User Group)

Defining user groups allows you to efficiently assign all the access and delivery type rights required for a role (eg. supervisor, data entry) to an authorized user by assigning them to one or more user groups.

Available reports

- list of user groups for current customer or for all
- list of users assigned to group

Fields [313] (see the next section)

Tasks

- Adding or editing a user group [313]
- Adding or editing access rights for a user group [313]
- Deleting a user group [315]

Distinctive menu options:

View menu
- View users (Viewing or printing the list of user groups [315])

Edit menu
- Copy and add [313]

Module window:

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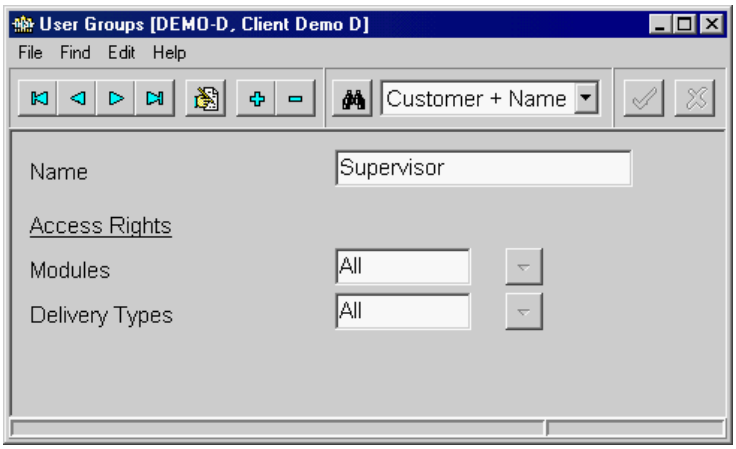

9.2.4.2 Fields (User Group)

Name
Name of the group. This name will appear in the drop-down list associated to the Groups field in the Authorized User module.

Access Rights
Modules
Choice field containing "None", "Partial" or "All".
This field indicate the access rights to the selected modules. When "Partial" is selected, it is necessary to click on the drop-down button located to the far right of the field, to add or delete the desired modules.

Delivery Types
Choice field containing "None", "Partial" or "All".
This field indicate the access rights to the selected delivery types. When "Partial" is selected, it is necessary to make a selection as for the previous field.

9.2.4.3 Adding or editing a user group

1. Open the **Customer->User Group** module
2. Perform one of the following operations :
- To add a user group, click on the **Add** button.
- To modify a user group, search for it and click on the **Edit** button when it is displayed on the screen.
- To copy an existing group to a new customer, navigate to the group to be copied, and select **Edit->Copy and add**.

3. Enter or modify the name of the group in the Name field.
4. Set the **Modules** and **Delivery Types** access parameters (see the next section 313 for more details).
5. Click on the **Accept** button.

9.2.4.4 Adding or editing access rights for a user group

1 Click on **Customer**->**User Group** from the Main window.
2 Search the desired user groups and click on the **Edit** button when this group is on the screen.
3 Move to the Modules field and select the desired value. If "Partial" is selected, click on the drop-down button to the far right of the field. A window appears, containing the modules already granted to the group.

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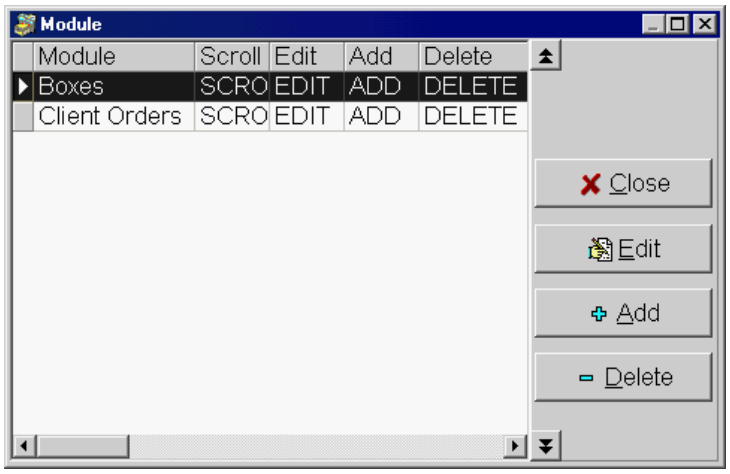
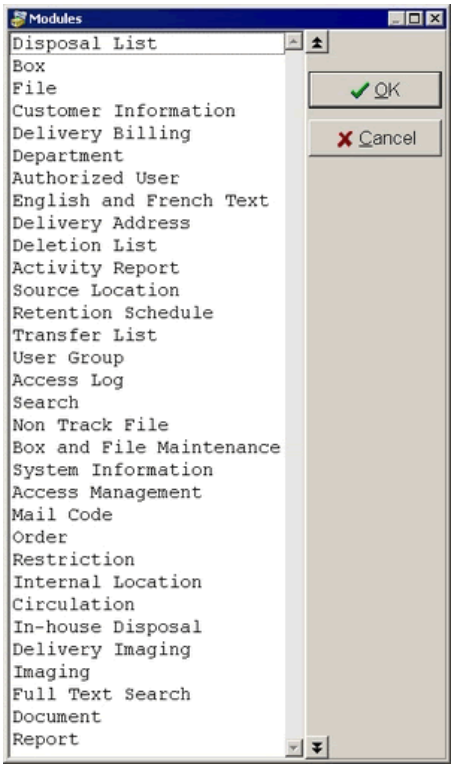


Note : 4 different access rights can be granted to one module.
S : Scroll; E : Edit; A : Add; D : Delete.

4 Perform one of the following operations :

- To remove the access rights to a module, select it and click on the **Delete** button.
- To add access rights to a module, click on the **Add** button. A window appears.



Select a module and press **OK**. A window is displayed and allows to specify the access rights to the selected module.

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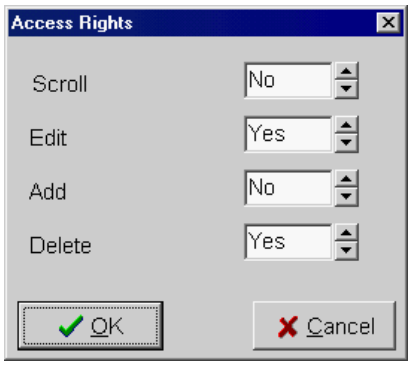


Click on the choice button of the desired fields, set them to "Yes" and press **OK**. The module, including its access rights, appears in the window opened in **3**.

5 Move to the Delivery Types field and follow the same steps as for that attribution of access rights to modules.

6 Click on the **Accept** button to save the changes.

9.2.4.5 Deleting a user group

1 Click on **Customer**->**User Group** from the Main window.

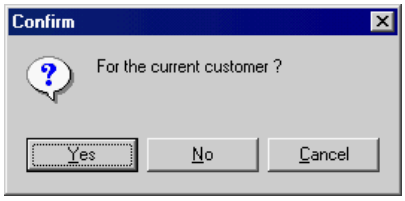
2 Search for the desired group and click on the **Delete** button when this group is on the screen.

Note : To delete a group, it must not be granted to any authorized user. If it becomes necessary to delete it, open the Authorized User module and remove the user group in the Groups field of the related users (see "Adding or editing access rights of a user 306 ").

9.2.4.6 Viewing or printing the list of user groups

1 Click on **Customer**->**User Group** from the Main window.

2 Click on **File**->**View Report**|**Print Report**. A dialog box appears.



3 Click on the **Yes** button to produce a report for the current customer only or click on the **No** button to produce a complete report. The report will be printed or displayed soon after.

9.2.5 Retention Schedule

9.2.5.1 Overview (Retention Schedule)

Managing the retention of different record series is a vital aspect of records management.

This module permits you to create, edit, and consult record series profiles used in classifying records and calculating when and how to dispose of them.

It is possible to associate restrictions to these record series and departments, and it is also possible to edit their notes

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Available reports

- list of record series

Fields[317] (see the next section)

Tasks

- Creating or editing a document type[319]
- Adding or removing restrictions associated to a document type[321]
- Viewing or printing the list of record series, including restrictions and retention periods[322]

Distinctive menu options:

View menu

- Notes (Viewing notes or restrictions associated to a document type)[321]
- Restrictions

Edit menu

- Notes (Adding or editing notes associated to a document type[320])
- Transfer (Transferring documents from a record series to another[319])

Module window:

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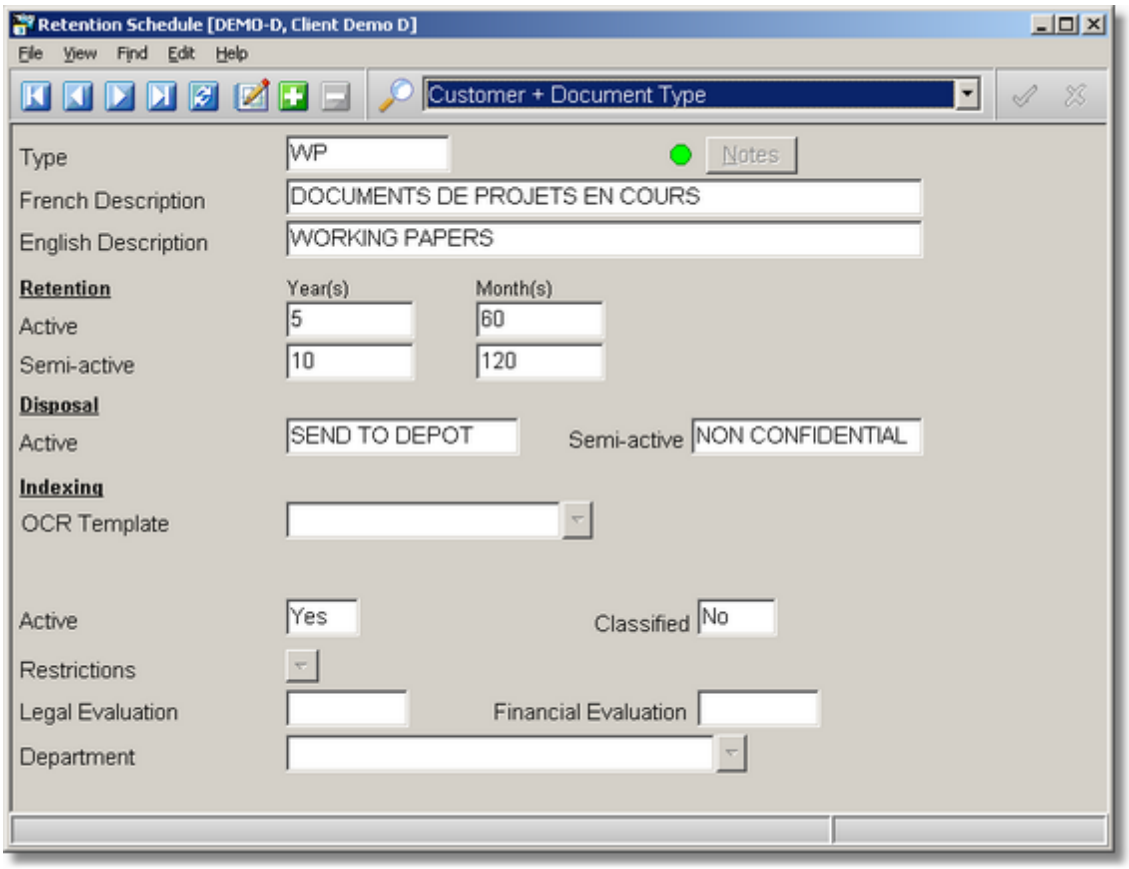

9.2.5.2 Fields (Retention Schedule)

Type
Required alphanumeric field containing a maximum of 10 characters.
This field indicates the name of the document type. This value will appear in the drop-down list associated with Type field of the Box and File modules.

French Description and English Description
Optional alphanumeric fields containing a maximum of 80 characters each.
These fields give the French and the English description of the document type.

Retention
Active
Numeric field containing a value up to 999 years or 11 988 months.
This field indicates the active retention period for boxes and files of the selected type. Items that have not yet been sent to the record center are considered active. Once they have been sent to the record center, their storage is considered semi-active.

Semi-Active
Required numeric field containing a value up to 999 years or 11 988 months.
This field indicates the semi-active retention period for boxes and files of the selected type.

Note : If the conservation policy is based on record series and if the conservation periods are modified , the system will ask if the disposal dates for the boxes and files have to be updated. When this is the case, the system may be busy for a while if many documents are associated with the edited types.

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Note : Variable disposal dates are calculated by adding the total retention period (Active + Semi-Active) to the end date of the record, or (if absent) the entry date. The division of this time into active versus semi-active storage is intended for customers who use ActiveFile or ActiveWeb to manage their in-house files. It can be used to suggest when items can be sent to the record center. However, it is the total retention period that matters in calculating the final disposal date.

Disposal

Active

Drop-down field that can contain the values described below .
This field indicates how the documents will be disposed of at the end of their active retention period.

Semi-active

Drop-down field that can contain the values described below.
This field indicates how the documents will be disposed of at the end of their semi-active retention period.

The following list describes the disposal modes :

CONFIDENTIAL
These documents will be disposed in a confidential manner.

NON-CONFIDENTIAL
These documents will be disposed in a non-confidential manner.

NONE
A disposal mode has not been determined.

PERMANENT
These documents will never be disposed of.

REVISION
These documents will be placed on a list so that they can undergo a special verification before being disposed of.

SAMPLE
These documents will be placed on a list so that samples can be extracted before disposing of the remaining items.

SEND TO DEPOT
Documents must be sent to another storage area, different from the off-site record center, where they will be stored indefinitely. From that moment on, the off-site record center will no longer be responsible for the conservation of the documents.

Indexing

OCR Templates

Read-only drop-down field.
This field is only available for customers that have EDC ActiveFile. This field indicates the template that will be used for the auto-indexing of the images. The templates are defined by the customer in the customer version of EDC (EDC ActiveFile).

Active

Choice field containing "Yes" or "No".
When the value of this field is "No", this type is set as inactive and can no longer be associated to documents.

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Classified
Choice field containing "Yes" or "No".
This field indicates that the document has a classified status.This field is for internal use.

Restrictions
Drop-down field containing the values defined in the Restriction[333] module.
This field is viewable only when the Restriction Integrity field of the Customer Information module is set to "Yes", and when the customer is not electronically linked to the record center. This field indicates the restrictions associated with the selected type.

Legal Evaluation
Optional alphanumeric field containing a maximum of 4 characters.
This field indicates how long the document needs to be conserved from a legal point of view. This field is for internal use.

Financial Evaluation
Optional alphanumeric field containing a maximum of 4 characters.
Indicates how long the document needs to be conserved from a fiscal point of view. This field is for internal use.

Department
Drop-down field associated to a list defined in the system.
This field is visible only when the Types by department field of the Customer Information module is set to "Yes". It indicates the department that will automatically be attributed to a document of the selected type.

9.2.5.3 Creating or editing a document type

Consult the fields' descriptions[317] above to have an outline of the settings that can be entered.

1 Click on **Customer**->**Retention Schedule** from the Main Window.
2 Perform one of the following operations :
- To create a document type, click on the **Add** button.
- To modify a document type, search it and click on the **Edit** button when the record series is displayed on the screen.

3 Enter or modify the information in the appropriate fields.
4 Click on the **Accept** button.

Note : When accepting modifications, a window appears and lets you enter notes. Proceed if so desired and press **OK**.

9.2.5.4 Transferring documents from a document type to another

This operation allows to transfer all the documents from a record series to another one. For example, if a company decides that they reduce the amount of record series, one will need to perform this operation.

1 Click on **Customer**->**Retention Schedule** from the Main Window.
2 Click on **Edit**->**Transfer**. A window is displayed.

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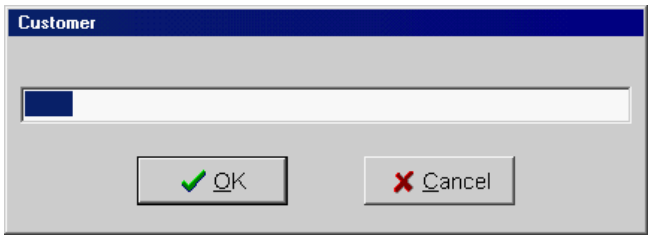
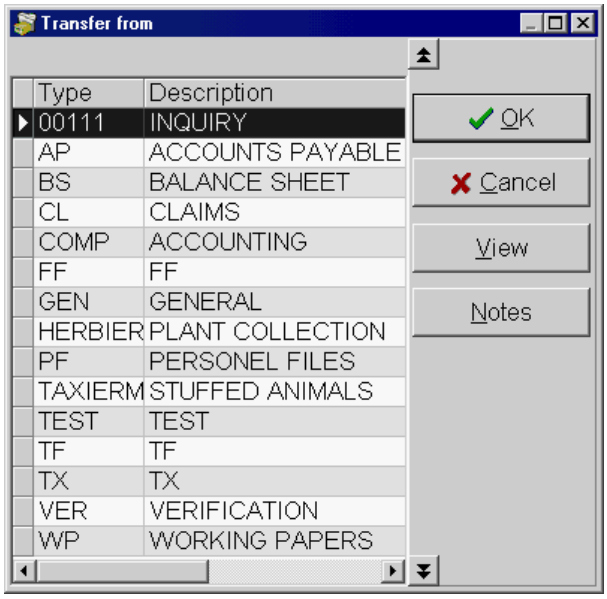


Enter a customer code and press **OK**.

3 A window appears.



Select the source record series and press **OK**.

Note : The View and Notes buttons allow respectively to view the active and semi-active retention period of the selected document type, and also its related notes.

4 A window appears, similar to the one opened in **3**, and allows to select a target document type. Proceed and press **OK**.
5 The system automatically transfers the documents. This operation may take some time if the concerned record series contains many documents.

9.2.5.5 Adding or editing notes associated to a document type

1 Click on **Customer**->**Retention Schedule** from the Main Window.
2 Search the desired record series and click on **Edit**->**Notes** when the type is on the screen. A window appears and contains the notes already defined if such is the case.

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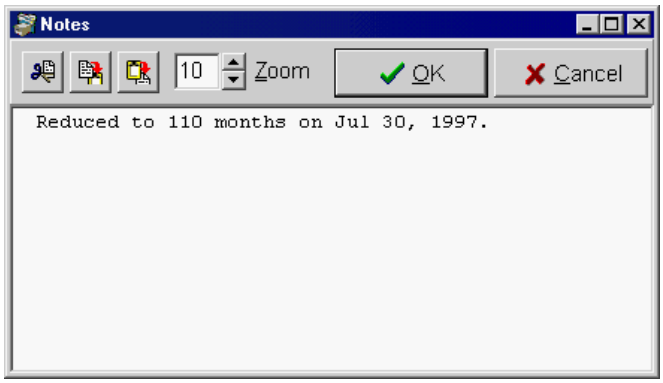

3 Enter or modify the notes and press **OK**.

9.2.5.6 Adding or removing restrictions associated to a document type

This operation is usually performed for customers that are not electronically linked to the off-site record center. Customers that use EDC ActiveFile can proceed from their workstation, since they are electronically linked to the record center .

1 Click on **Customer**->**Retention Schedule** from the Main Window.
2 Select the desired record series and click on the **Edit** button when the type is on the screen.
3 Click on the drop-down button beside the Restrictions field. The following window appears, containing the restrictions already associated to the document type.

4 Perform one of the following operations :

- To add a restriction, click on the **Add** button. Select a restriction in the list that is displayed and click on the **Accept** button.
- To delete a restriction, select it and click on the **Delete** button.

5 Repeat step **4** to add or delete other restrictions.
6 Click on the **Close** button to terminate the additions and removals.
7 Click on the **Accept** button to save the changes.

9.2.5.7 Viewing notes or restrictions associated to a document type

1 Click on **Customer**->**Retention Schedule** from the Main window.
2 Search the desired record series and click on **View**->**Notes|Restrictions** when this type is displayed on the screen. Notes and restrictions will be printed or displayed automatically.

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9.2.5.8 Viewing or printing the list of document types, including restrictions and retention periods

1 Click on **Customer**->**Retention Schedule** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. The report is printed or displayed soon after.

9.2.6 Department

9.2.6.1 Overview (Department)

This module allows the management of departments and sub-departments for customers of the record center.

The information about departments and sub-departments can be displayed or printed. New departments and sub-departments can also be created. This information will be used to categorize boxes and files.

Available reports

- List of departments and sub departments, for current customer or all

Fields[323] (see the next section)

Tasks

- Creating or editing departments and sub-departments[323]
- Deactivating sub-departments[325]
- Transferring documents of a sub-department to another department[325]
- Transferring documents of a sub-department to an existing sub-department[326]
- Viewing or printing the list of departments, including sub-departments[328]

Distinctive menu options:

View menu

- Document types[324]

Edit menu

- Transfer
  - Sub to main department[325]
  - Sub to sub-department[399]

Module window:

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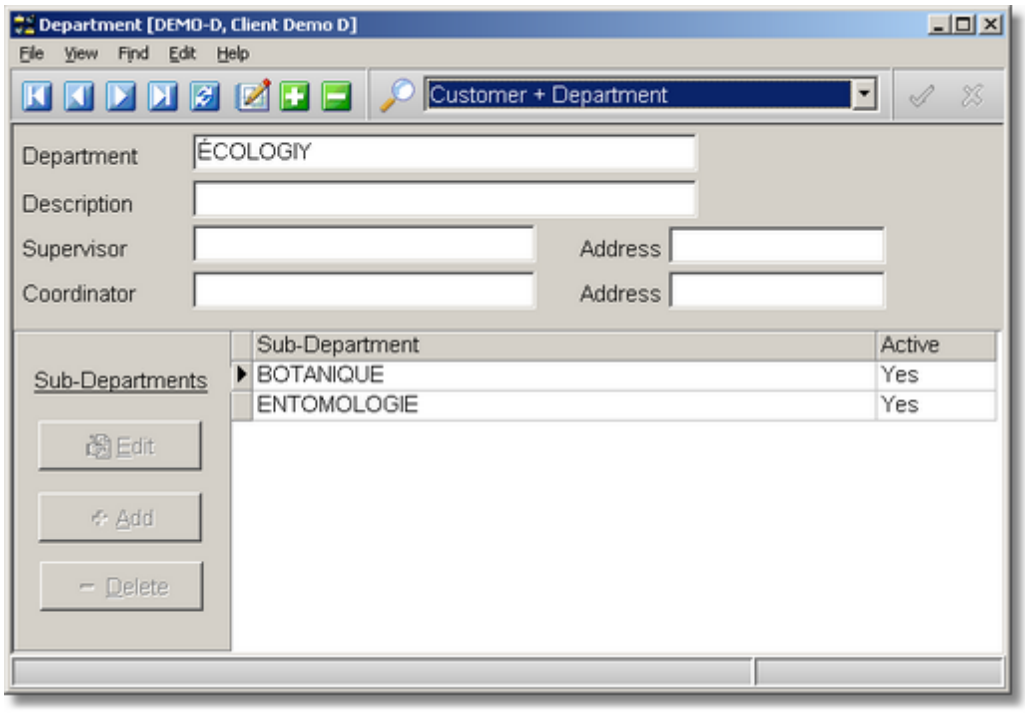

9.2.6.2 Fields (Department)

Department
Required alphanumeric field containing a maximum of 30 characters.
This field indicates the department's name. This value will appear in the drop-down lists associated with the Department field in the Box and File modules.

Description
Alphanumeric field containing a maximum of 35 characters.
This field allows to enter a description for the department.

Supervisor and Address
This field shows the name and address of the supervisor for this department at the customer's office.
This field is for internal use.

Coordinator and Address
Here are the name and address of the coordinator for this department at the customer's office. This field is for internal use.

Sub-Departments
Required alphanumeric field containing a maximum of 30 characters.
This field indicates the list of the sub-departments for the selected department.

9.2.6.3 Adding or editing departments and sub-departments

One department and one sub-department have to be created before entering the first box in the inventory. A department needs to contain at least one sub-department. Every document in the inventory has to be associated to a department and a sub department.

The definition of departments and sub-departments is extremely important for customers whose billing or retention is done by department (see the Billing[248] and Retention[248] fields of the Customer Information

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module).

The modification of a department can be performed at the record center for customers that do not use EDC ActiveFile. Note that customers who do use EDC ActiveFile must modify their departments themselves, since they are electronically linked to the record center.

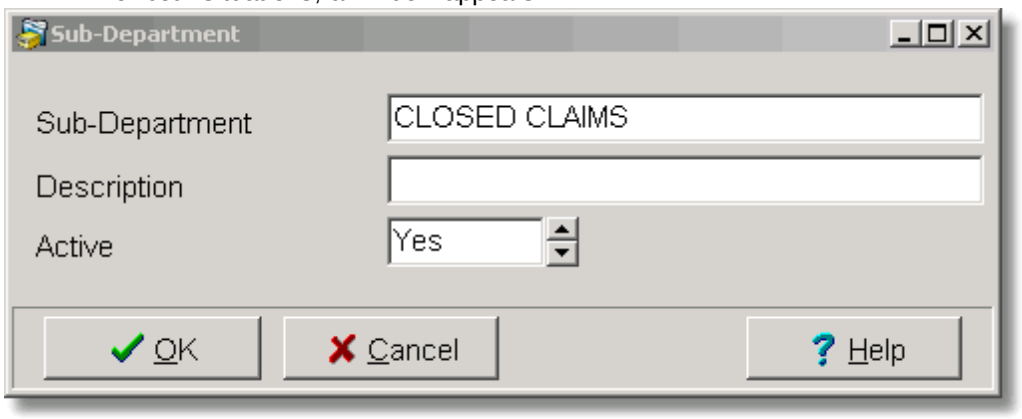
1 Click on **Customer**->**Department** from the Main window.
2 Make one of these operations :
- To add a department, click on the **Add** button.
- To modify a department, select it and click on the **Edit** button.

Note : When adding, a dialog box appears and asks for a customer code. Enter the code of the desired customer and press **OK**.

3 Move to the Department field and enter or modify the name of the department.
4 Move to the Supervisor field and enter or modify the name and address of the supervisor.
5 Move to the Coordinator field ant enter or modify the name and address of the coordinator.
6 Move to the Sub-department section and perform one of the following operations :

- To add a new sub-department, click on the **Add** button.
- To modify an existing sub-department, select the desired item in the list of sub-departments and click on the **Edit** button.

For both situations, a window appears.



Note : When adding a new sub-department, this window does not contain any information.

Enter or modify the name of the sub-department and specify if this sub-department is active or not. Click on the **Accept** button.

7 Click on the **Accept** button of the module when finished.

9.2.6.4 View document type (department module)

If a customer has the option record series by department[256] set to Yes in the **Customer->Customer Information** module, record series created in the customer->retention schedule module[317] will be assigned to a department.

To view record series belonging to a department

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1. In the **Customer->Department** module, select **View->Document type**. If record series have been assigned, the list appears.

9.2.6.5 Deactivating sub-departments

In order to deactivate a sub-department, it only needs to be edited and set as inactive.

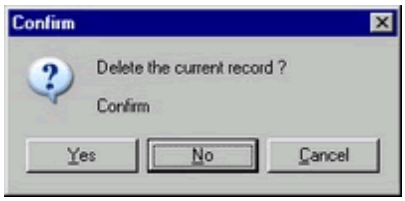
See step **6** in "Adding or editing departments and sub-departments 323" for more details.

Note that if a department is included on a departmental invoice, EDC will produce an error message if you attempt to inactivate the final remaining sub-department.

9.2.6.6 Deleting a department

In order to delete a department, it must have no assigned boxes or file for that customer. The option to delete will only be available if the customer is not replicated.

1 Click on **Customer**->**Department** from the Main Window.
2 Click on **Edit**->**Delete** or click on the **Delete** button from the icon bar. A window appears.



3 To accept the deletion of the department press Yes; to cancel the operation press No or Cancel.

Note: An error message will appear if the selected department is assigned to an item. One must do a search for boxes and files related to that department and change their departments before successfully performing the operation.

9.2.6.7 Transferring documents of a sub-department to another department

This operation will simply move the sub-department from its department to a different department. The target department must not contain a sub-department of the same name. The original sub-department will be erased.

1 Click on **Customer**->**Department** from the Main Window.
2 Click on **Edit**->**Transfer**->**Sub to Main Department**. A window appears and asks to specify which customer is concerned by the operation.
3 Enter the code of the desired customer and press **OK**. A window opens.

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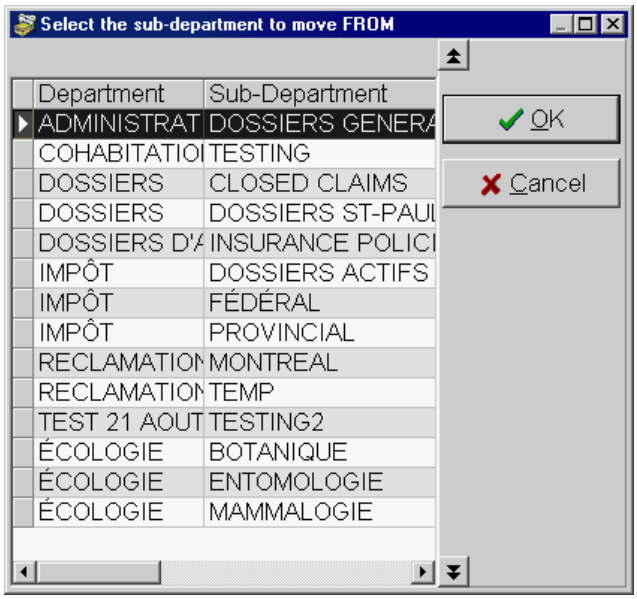
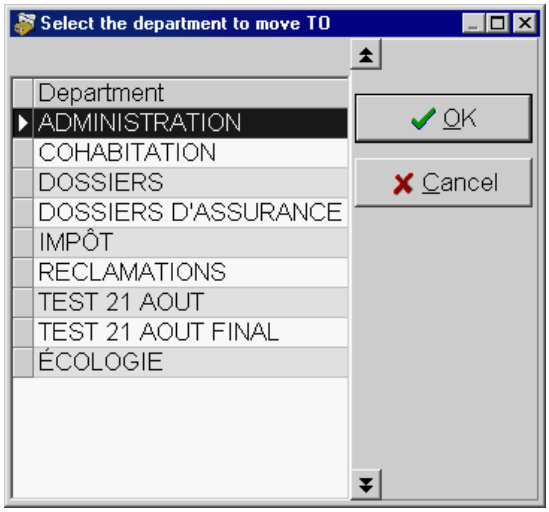


4 Select the sub-department to be moved and press **OK**. Another window is displayed.



5 Select the target department and press **OK**. The source sub-department is deleted in the system.

6 The system moves all the documents of the sub-department previously selected. A message is displayed on the screen during the moving and indicates the update of boxes and files in question. This message disappears automatically when finished.

Note : This operation may take some time if the concerned sub-department contains many documents.

9.2.6.8 Transferring documents of a sub-department to an existing sub-department

This operation will move all the documents from a sub-department to an other existing sub-department. The documents are added to the content of the target sub-department and the source sub-department is not deleted from the system.

1 Click on **Customer**->**Department** from the Main Window.

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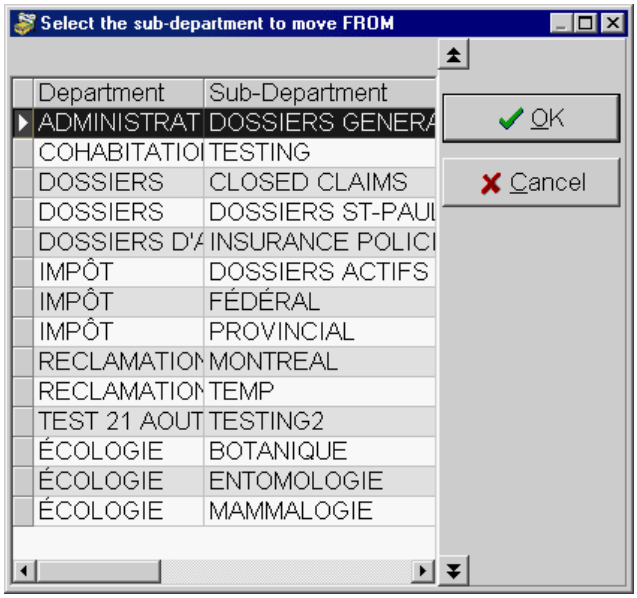
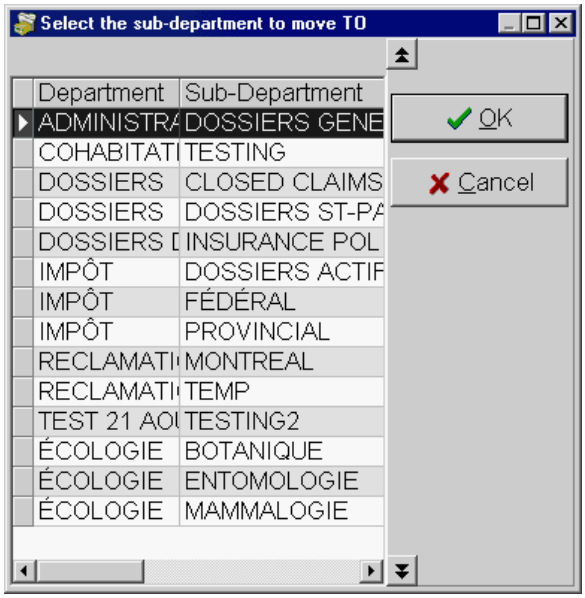
2 Click on **Edit**->**Transfer**->**Sub to Sub-Department**. A window appears and asks to specify which customer is concerned by the operation.

3 Enter the code of the desired customer and press **OK**. A new window opens.



4 Select the source sub-department and press **OK**. Another window is displayed.



5 Select the target sub-department and press **OK**. The transfer is automatically done in the system.

6 The system transfers all the documents of the source sub-department. A message is displayed during the transfer and indicates the update of boxes and files in question. This message automatically disappears when the transfer is finished.

Note : This operation may take some time if the source sub-department contains many documents.

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9.2.6.9 Viewing or printing the list of departments, including sub-departments

1. Click on **Customer->Department** from the Main Window.
2. Click on **File->View Report|Print Report**.
3. The report is automatically printed or displayed.

9.2.7 Source Location

9.2.7.1 Overview (Source Location)

Customers may specify a Source for boxes and files[448] . This module manages the list of sources that the customer may select from.

Available reports

- List of source locations (for current customer or all)

Fields[329] (see the next section)

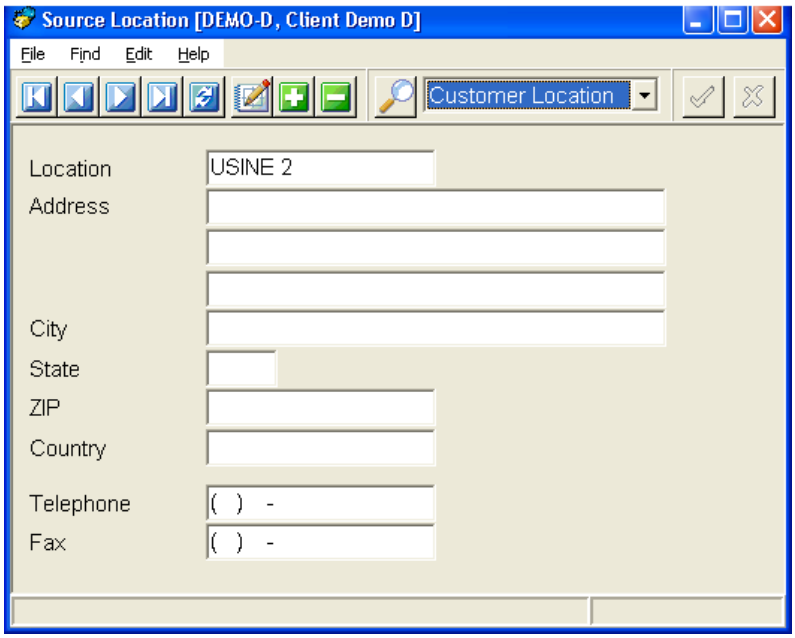
Tasks

- Creating or editing a source location[329]
- Deleting a source location[329]
- Viewing or printing the list of all source locations[329]

Distinctive menu options:

- (None)

Module window:



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9.2.7.2 Fields (Source Location)

Location
Required alphanumeric field containing a maximum of 10 characters.
Indicates the location's code. This value will be displayed in the drop-down list associated with the Source field of the Box module.

Coordinates
Optional alphanumeric fields giving details about the location's coordinates.

9.2.7.3 Adding or editing a source location

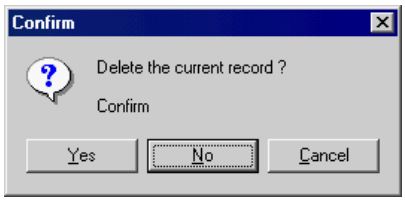
1. Click on **Customer->Source Location** from the Main window.
2. Perform one of the following operations :
- To add a source location, click on the Add button.
- To modify a source location, perform a search and click on the Edit button when the desired source location is displayed on the screen.

Note : When adding a new location, a window appears and asks to specify which customer is concerned. Enter the code of the desired customer and press **OK**.

3. Move to the Location field and enter or modify the name of the source location.
4. Enter or modify the coordinates of the source location in the appropriate fields.
5. Press **OK** in order to save the modifications.

9.2.7.4 Deleting a source location

1 Click on **Customer**->**Source Location** from the Main window.
2 Perform a search to find the source location to be deleted.
3 When the desired location is displayed on the screen click on the **Delete** button. A dialog box appears.



4 Click on the **Yes** button to confirm the deletion.

Note : In order to be deleted, a source location must not be associated with any box. It will then be necessary to open the Box module and remove that source location from the Source field for all the boxes that have it.

9.2.7.5 Viewing or printing the list of all source locations

1 Click on **Customer**->**Source Location** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. The report will be displayed or printed automatically from the default printer.

9.2.8 Delivery Address

9.2.8.1 Overview (Delivery Address)

This module permits you to add and modify delivery addresses for customers. It is also possible to add notes to appear on the delivery slip for that address. (egg. "Use elevator #2")

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Available reports

- List of all delivery addresses (for one or all customers).

Fields[330] (see the next section)

Tasks

- Adding or editing a delivery address[332]
- Deactivating a delivery address[332]
- Editing or viewing notes associated with a delivery address[333]
- Viewing or printing the list of delivery addresses[333]

Distinctive menu options:

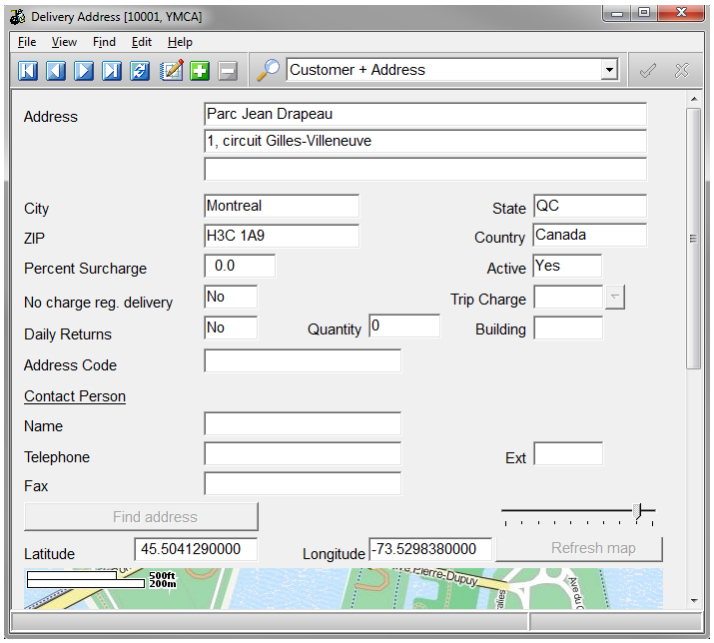
View menu

- Notes[333]

Edit menu

- Notes[333]

Module window:



9.2.8.2 Fields (Delivery Address)

Address/City/Province/Postal Code
These fields indicate the exact coordinates of the delivery address.

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Percent Surcharge
Choice field containing values "0.0" to "999.9"
This field allows the charges for item delivery handling, trip charge, and fuel surcharge to be increased for the specified customer addresses by the specified amount when the delivery type has courier set to 'Record Center'. It is not applied when the courier is imaging, fax, or external.

Example: If the basic trip charge is $10 and a % surcharge of 50% is applied for this address, the trip charge will appear on the delivery and invoice as $15.

Active
Choice field containing "Yes" or "No".
This field indicate if the delivery address is active. When it is set to "No", the address will not appear on the list associated to the Delivery Address field of the Authorized User module or on the choice list of the Orders module when placing an order.

No charge reg. delivery
Choice field containing "Yes" or "No".
When this field is set to "Yes", no transport costs are billed for regular deliveries for this address.

Trip Charge
A choice field allows the selection of a price code. This price code will be added once per delivery to this address for delivery types that use "record center" courier method.

Daily Returns
When this field is set to "Yes", an order for return items is automatically created by the system for each working day. The order is created at the same time as a picking list in the Picking List 620 module. The daily returns are set for AM or PM, according to the pick up settings of the client in the Customer Information 248 module.

Quantity
Numeric field containing a maximum of 4 characters.
This field indicates how many items must be returned daily. This field is effective only when the previous field is set to "Yes".

Building
If your record center has multiple buildings and your client has an order where the service building is not obvious from the location of the items (e.g. a request for pick-up of boxes, shredding rotations, or line item sales), the order will be created using the record center service building specified here.

Address code
Alphanumeric field containing a maximum of 15 characters.
This field provides an alternate identification for a delivery address. This is useful for actions such as setting up tape rotation schedules by importing from a spreadsheet. ***

Contact Person
Name/Ext/Telephone/Fax
These fields allow to enter the name and coordinates of the person responsible for deliveries at this address.

Find address / Latitude / Longitude / Refresh map

EDC uses mapquest to help you plan and optimize your delivery routes. Either clicking on the "Find Address" button or attempting to optimize a delivery route that contains the delivery address in question will cause Mapquest to look up the address (including the street address and the postal code) to

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"Geocode" the address - finding its latitude and longitude.

You can manually tell EDC to geocode an address by clicking on the "Find Address" button. This will usually be correct. However, if you need to make adjustments, you may manually enter or adjust the Longitude and Latitude of the address and then click on the "Refresh Map" button.

If the address cannot be found automatically, this tool may help http://itouchmap.com/latlong.htmland then latitude/longitude values may be set manually.

For instructions for initial mapping set-up, see Setting up a customer for shredding service 130

9.2.8.3 Adding or editing a delivery address

1. Click on **Customer->Delivery Address** from the Main window.
2. Perform one of these operations :

- To add an address, click on **Edit->Add**.
- To modify an address, find the desired address and keep it on the screen. click on **Edit->Edit**.

Note : When adding an address, a window appears and asks to specify which customer is concerned. Enter the code of this customer and press **OK**.

3. Enter or modify the desired information in the appropriate fields.
4. Click on the **Accept** button when finished.

9.2.8.4 Deleting a delivery address

For record-keeping reasons, a delivery address is never deleted in the system. When judged necessary, an address can be deactivated in order to prevent delivery errors.

1. Click on **Customer->Delivery Address** from the Main window.
2. Find the desired address and keep it on the screen, click on **Edit->Edit**.
3. Move to the Active field and set it to **"No"**.
4. Click on the **Accept** button to save changes.

Note: Delivery addresses cannot be made inactive while future tape rotations are scheduled for it. If a warning similar to the following appears, you may use the 'change the delivery address' 496 function from the **Inventory->Rotation Schedule** to change the delivery address for the affected tapes if appropriate.

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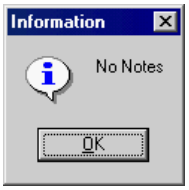
9.2.8.5 Editing or viewing notes associated with a delivery address

1. Click on Customer->Delivery Address from the Main window.
2. Find the desired address and keep it on the screen.
3. Perform one of these operations :

- To add or edit notes, click on Edit->Notes. The report's window appears. Enter or edit the notes and press OK.
- To display notes, click on View->Notes. The report's window appears. Click on the Close button to end the viewing.

Note : If no notes have been defined, a message appears.



Press **OK** to go back to the module.

9.2.8.6 Viewing or printing the list of delivery addresses

1 Click on **Customer**->**Delivery Address** from the Main window.
2 Click on **File->View Report**|**Print Report**. The report is automatically displayed or printed form the default printer.

9.2.9 Restriction

9.2.9.1 Overview (Restriction)

Restrictions are used to prevent some documents from being put on a disposal list inadvertently. Every document associated with a restricted type will be preserved as long as the restriction is in place, unless they are specifically put on a disposal list. Once defined, restrictions can be applied or removed[321] in the Retention Schedule[315] module.

Available reports

- list of all restrictions (for all customers or current customer)

Fields[334] (see the next section)

Tasks

- Adding or editing a restriction[334]
- Deleting a restriction[334]
- Viewing or printing record series related to a restriction[335]
- Viewing or printing the list of all restrictions[335]

Distinctive menu options:

View menu

- Record series[335]

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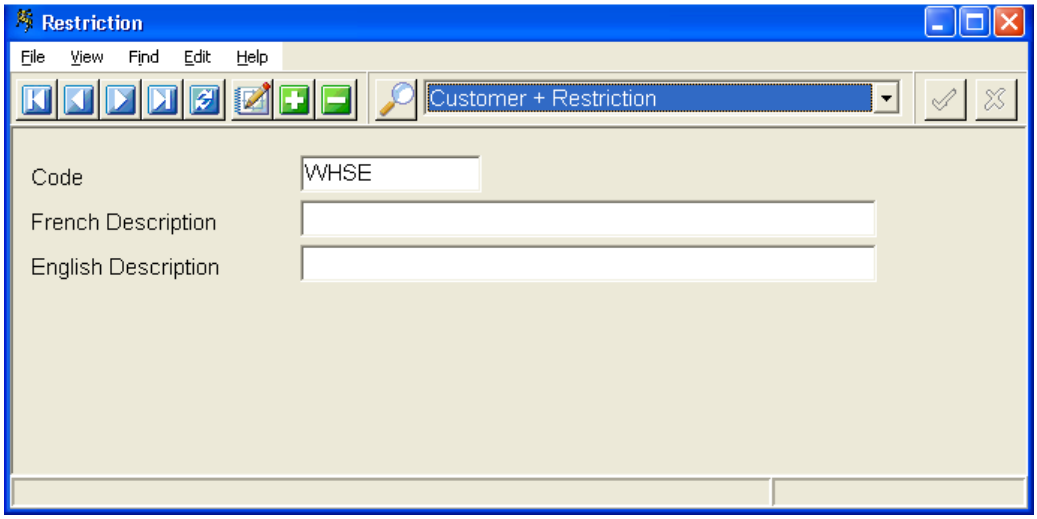
Module window:



9.2.9.2 Fields (Restriction)

Code
Required alphanumeric field containing a maximum of 10 characters.
This field indicates the name (the code) of the restriction. This value will appear in the drop-down list associated with the Restrictions field of the Retention Schedule module.

French Description/English Description
Required alphanumeric fields containing each a maximum of 80 characters.
These fields indicate the description of the restriction both in English and French.

9.2.9.3 Adding or editing a restriction

1. Click on **Customer->Restriction** from the Main window.
2. Perform one of the following operations:
- To add a restriction, click on the **Add** button.
- To modify a restriction, find the desired restriction and click on the **Edit** button when it is displayed on the screen.
3. Enter or modify the code of the restriction in the Code field.
4. Enter or modify the French or English description in the appropriate fields.
5. Click on the **Accept** button when finished.

9.2.9.4 Deleting a restriction

1 Click on **Customer**->**Restriction** from the Main window.
2 Find the desired restriction and keep it on the screen, click on the **Delete** button. The system automatically removes the restriction.

Note : A restriction cannot be removed when it is associated to one or many record series. In this case it becomes necessary to remove all the related record series in the Retention Schedule[315] module.(See the view the record series associated to a restriction[335] section.)

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9.2.9.5 Viewing or printing document types related to a restriction

1 Click on **Customer**->**Restriction** from the Main window.
2 Find the desired restriction and keep it on the screen, click on **View**->**Document Types**.
3 The list of record series associated to the restriction appears. This list can be printed by clicking on the **Print** button of the report's window.

Note : Displaying the list of types associated to a restriction can be useful when they have to be retrieved from the restriction (in order to remove the restriction itself.)

9.2.9.6 Viewing or printing the list of all restrictions

1 Click on **Customer**->**Restriction** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. The report is displayed or printed automatically.

9.2.10 Customer Holidays

9.2.10.1 Overview (Customer Holidays)

Entering dates in this module will prevent EDC RC from inadvertently scheduling deliveries when the record center is opened but the customer is not. This is especially necessary for customers that schedule tape rotations. Holidays should be entered at least as far into the future as rotation schedules are entered.

Available reports

- None. (See the Report[501] module)

Fields[336] (see the next section)

Tasks

- Adding customer holidays[336]
- Editing or deleting customer holidays[337].

Distinctive menu options:

None.

Module window:

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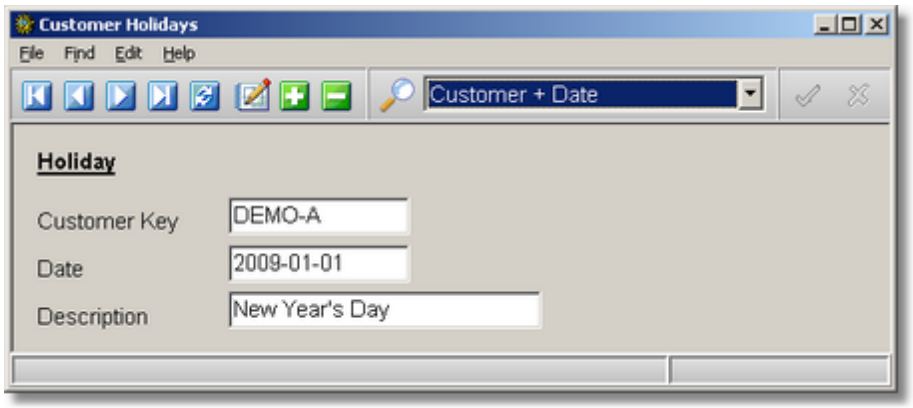


9.2.10.2 Fields (Customer Holidays)

Customer Key
This field allows to identify the customer concerned by the current holiday.

Date
Field with predefined date mask that allows to specify the date for the holiday. The date mask is defined in the System information module in the Date Mask field.

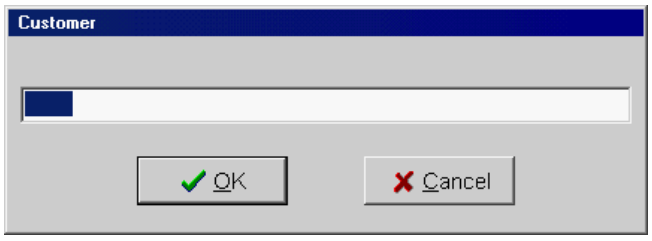
Description
This field allows to clearly identify the holiday. This description generally corresponds to the usual denomination of the day, (example: "Christmas" or "New Year's".)

9.2.10.3 Adding customer holidays

The holiday registered here will prevent tapes from being delivered to the customer on the specified date. The system will consider both customer holidays and record center holidays when calculating delivery dates.

For example, if a customer is closed on December 31st and January 1st, and the record center is closed on the same days, as well as January 2nd. If the customer places a regular order on December 30th, the delivery date for this order will automatically be deferred to January 3rd.

1 Click on **Customer**->**Customer Holidays** from the Main window.
2 Click on **Edit**->**Add**. A window appears.



3 Enter the code for the customer in question and press **OK**. The code is automatically displayed in the Customer Key field.
4 The cursor is on the Date field. Enter the date of the desired day.
5 Move to the Description field, enter a summary description for the holiday and press **OK**.

Note : The system allows to enter only one holiday for the same date, even if descriptions are different.

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9.2.10.4 Editing or deleting customer holidays

1 Click on **Customer**->**Customer Holidays** from the Main window.
2 Find the desired holiday and keep it on the screen. Then click on **Edit**->**Edit|Delete**.
3 There are two possibilities :

- When editing a holiday, enter new information in the appropriate fields and press **OK** to register changes.

- When deleting a holiday, a dialog box appears and asks to confirm the operation. To do so, click on the "Yes" button. The holiday is automatically deleted in the system and the date in question becomes a potential delivery date for this customer.

9.3 Record Center Management (Management tab)

9.3.1 Outline (Management)

Modules on the Management tab generally apply to the record center as a whole.

Modules

- Employee 338
- Employee Group 344
- Delivery Vehicle 348
- Business Type 350
- Holidays 351
- Building 353
- Dictionary 360
- Access Log 362
- System Information Module 364
- Customer Export 388

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- Customer Purge[391]

9.3.2 Employee

9.3.2.1 Overview (Employee)

This module is used to manage all the employees of the record center. An employee can be created separately, having a personal password and specific access rights to the system, according to his/her responsibilities at the record center.

The main interest of this module is the allocation of specific access rights to the system for each employee.

Available reports

- List of employees

Fields[339] (see the next section)

Tasks

- Creating a new employee[340]
- Adding or editing access rights for an employee[340]
- Adding or editing password for an employee[342]
- Deleting an employee[343]
- Viewing or printing the list of all employees[343]
- Printing an employee bar code[344]
- Reactivating the profile of an employee[344]

Distinctive menu options:

File menu

- Print thermal label[344]

Edit menu

- Password[342]

Module window:

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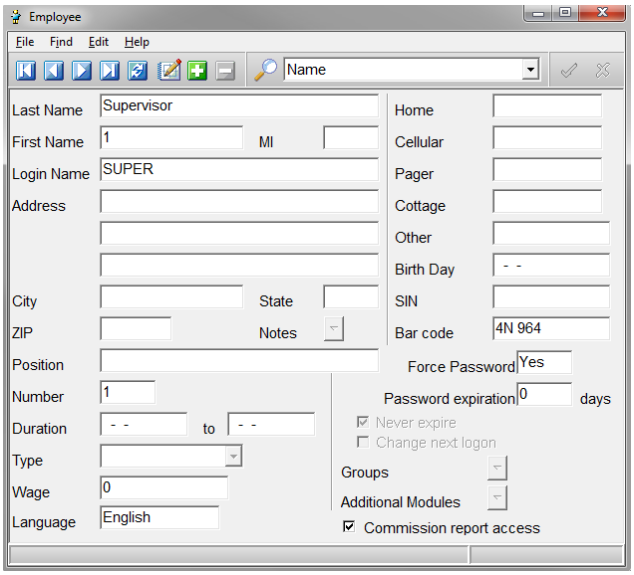

9.3.2.2 Fields (Employee)

Name / First Name
These fields allow the identification of the employee.

Login Name
Login name.

Coordinates
Contact information of the employee. These are for reference purposes.

Position
This field indicates the occupation of the employee at the record center.

***Bar code**
A bar code is automatically assigned to any employee added in the system. When a record center uses I.D. cards, the bar code may appear on these cards. Furthermore, this bar code must be scanned any time a PDT[762] is used, in order to identify the employee who is performing the operation.

Number
This number is automatically generated by the system for this specific employee.

Duration
You may enter the date on which the employee started working at the record center. Entering a "to" date will prevent further access to the system by the employee in question.
Note that repeated entry of incorrect passwords causes an employee profile to be made inactive, by automatically setting the end date to the present date.

Type
Drop-down field that can contain "Hourly", "Weekly", "Annually" or "By Contract".
This field indicates the type of payment given to the employee.

Wage
This field indicates the salary paid to the employee for a payment period. This field is related to the previous field.

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For example, when the Type field is set to "Weekly" and the current field is set to "400", it means that the employee gets 400$ for each week of work.

Language
Choice field containing "English" or "French" (if the default dictionary is installed).
This is the language used in the system by the employee. When an employee accesses the system, all the information is displayed in the language specified in this field.

Note : The language can be changed in any module by clicking on **Help**->**Change Language**.

Force Password
Choice field containing "Yes" or "No".
When this field is set to "Yes", the employee has to enter a password in order to access the system.

Password Expiration
This field allows to set a delay when the password will be expired. This occurs only when the previous field is set to "Yes". Alternatively, the password can be set to **Never Expire**.

Change next logon
Check this box if you wish to have the employee set their own password the next time they log in to the system. They will be prompted to enter their current or temporary password, then enter and confirm a new password. This box is automatically unchecked when the employee changes their password.

Groups
Drop-down field associated with a list defined in the Employee Group 344 module.
This field allows to include an employee in many employee groups so that he/she will have the same access rights as the selected groups.

Additional Modules
Drop-down field associated with a list defined in the system.
It is possible to add access rights to modules that are not included in the group(s) selected in the previous field.

Commission report access
Check box. When selected, this employee will be able to access the commissions report 705 through the file module of the **Accounting->Inventory** module.

9.3.2.3 Creating a new employee

1. Click on **Management**->**Employee** from the Main window.
2. Click on **Edit**->**Add**.
3. Enter information in appropriate field 339 s (see the previous section for more details).
4. Click on the **Accept** button to finish.

9.3.2.4 Adding or editing access rights for an employee

Employee rights need to be defined once an employee group has been added to the system. The employee group will define which modules and access rights (scroll, edit, add, delete) are available to the employees of a group.

The access rights that can be defined in the Employee module are unique to each employee. This enables the supervisor to customize the rights of an employee, IE, additional access can be granted for certain modules and additional employee groups can be associated.

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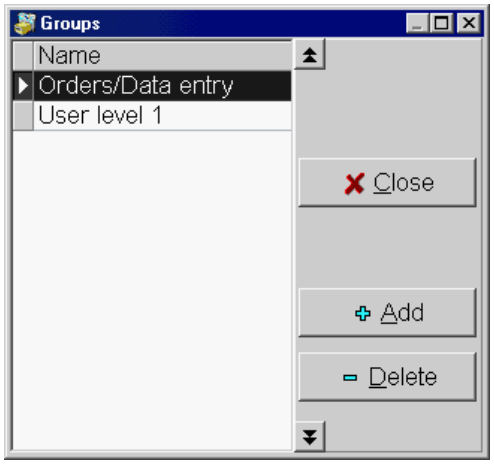
See the following topics for more information on Employee groups :
- Creating an employee group 345
- Adding or editing access rights for an employee group 345

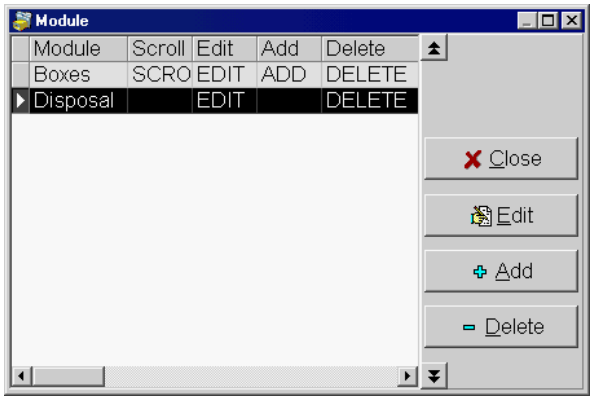
1 Click on **Management**->**Employee** from the Main window.
2 Search for the employee whose access rights must be added or edited.
3 When the desired employee is displayed on the screen click on **Edit**->**Edit**.
4 Move to the Groups field and click on the drop-down button to the right of this field. A window appears and contains all the groups already granted to the employee, when the employee was already created



Note : Remember that when an employee is included in a group he has its access rights.

5 Add or edit the access rights of the employee as follows :
- To include the employee in a group, click on the **Add** button, select a group in the list that is displayed and click on the **Accept** button. The name of the selected group will appear in the previous window;
- To remove the employee from a group, select the desired group and click on the **Delete** button. In order to confirm the deletion, press **OK** in the dialog box that appears.

6 Move to the Additional Modules field and click on the drop-down button to the right of this field. A window appears, containing the additional modules already granted to the employee.



Note : The words to the right of the modules indicate their access rights.

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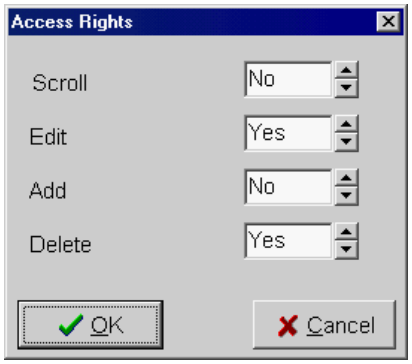
7 Add or edit additional access rights to the employee as follows :

- To add access rights to a module, click on the **Add** button, select a module in the list and press **OK**. A window appears and allows to specify the access rights to this module.



Click on the choice button of each field and set it to "Yes" and press **OK**.

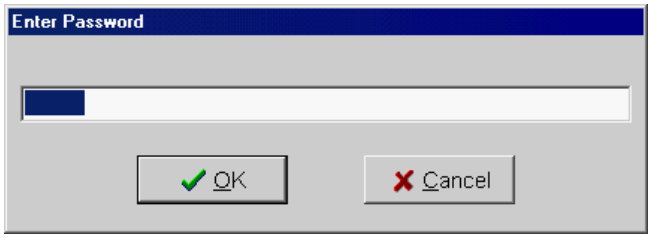
- To remove access rights to a module, select this module in the window opened in **6** then click on the **Delete** button. A dialog box appears in order to confirm the deletion. Click on the **Yes** button to proceed.

- To modify access rights to a module, select this module in the window opened in **6** then click on the **Edit** button. Proceed to the modification as when adding access rights to this module.

8 Click on the **Close** button of the windows opened in **4** and **6** when additions or removals are done, click on the **Accept** button.

9.3.2.5 Adding or editing password for an employee

1 Click on **Management**->**Employee** from the Main window.
2 Search for the employee whose password has to be created or edited.
3 When the desired employee is displayed on the screen, click on **Edit**->**Password**. A dialog box appears.



4 Enter a password and press **OK**.

Note : If a password has already been defined for this employee it will be automatically replaced by the new one. Passwords should be 6-16 characters long.

5 Enter once more the password in the window that is displayed in order to confirm the operation and press **OK**.

There is a shorter way to edit the password of an employee : modifying the password when entering the

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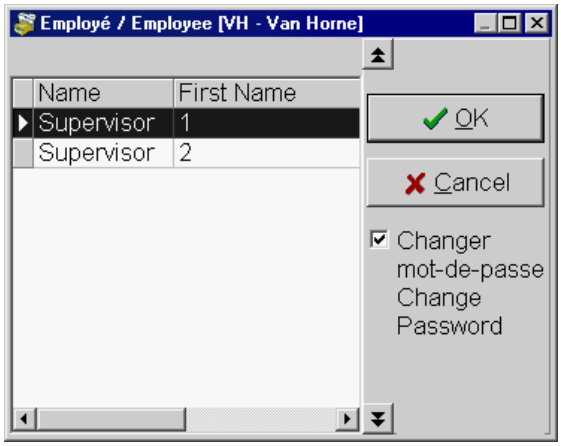
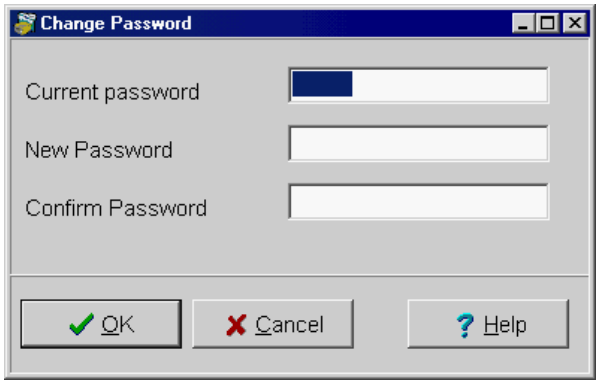
system.

1 Double-click on the EDC icon to open a new session.
2 Select an employee's name and check off the **Change password** box as follows.



3 Press **OK**. The following window appears instead of opening a new EDC software session.



4 Enter the requested information and press **OK**.
5 A new EDC software session opens and the password is modified. This new password will have to be entered when opening the next session.

9.3.2.6 Deleting an employee

1 Click on **Management**->**Employee** from the Main window.
2 Search for the employee to be removed and when he is displayed on the screen, click on **Edit**->**Edit**.
3 Move to the Duration field and enter a range of past dates. The employee's name will not appear anymore on the list displayed when opening an EDC session.

Note : It can be useful to enter a range of dates in the Duration field when creating a temporary employee. It will prevent access to the system for this employee as soon as his working contract ends.

9.3.2.7 Viewing or printing the list of all employees

1 Click on **Management**->**Employee** from the Main window.
2 Click on **File**->**View Report**|**Print Report**.

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3 The system automatically prints or displays the list of all the employees at the record center.

9.3.2.8 Printing an employee bar code

In order to use the PDT, every employee is automatically assigned a bar code for security and tracking reasons.

1 Click on **File** -> **Print Thermal Label**
2 The employee label will automatically be printed on the thermal printer.

9.3.2.9 Reactivating the profile of an employee

An employee's access may be removed by setting the end date of their duration of employment[339] to the past in the Management->Employee field. This is what happens if 10 incorrect passwords are entered for an employee within 10 minutes.

To reactivate the employee's profile,
1. Open the **Management->Employee** module.
2. Press **Ctrl-E** to edit.
3. Change or remove the end date in the Duration field
4. Press **Ctrl-Enter** or click the green check mark to accept.
5. If necessary, assign a new password[342].

9.3.3 Employee Group

9.3.3.1 Overview (Employee Group)

The Employee Group module permits the management of access rights for a group of employees, based on their roles within the record center. For each module in EDC RC, you can specify whether the group has the right to search (scroll), edit, add, and delete.

Assigning an employee to an employee group gives that employee all associated rights.

An employee with multiple roles may belong to multiple employee groups.

Available reports

- list of employees
- list of employee groups

Fields[345] (see the next section)

Tasks

- Creating an employee group[345]
- Adding or editing access rights for an employee group[345]
- Copying and adding an employee group[347]
- Deleting an employee group[348]
- Viewing or printing the list of all employee groups[348]

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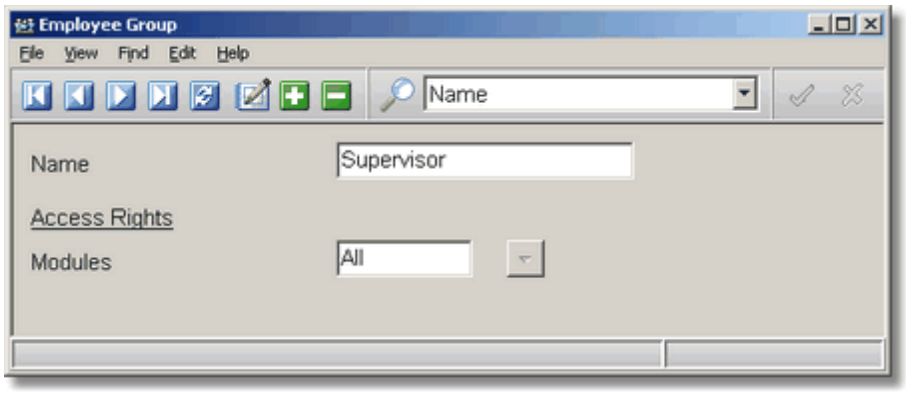
Distinctive menu options:

View menu
- View employees[348]

Edit menu
- Copy and add[347]

Module window:



9.3.3.2 Fields (Employee Group)

Name
Alphanumeric field of 40 characters.

This field identifies an employee group within EDC RC.

Access Rights
Modules
Choice field containing "All", "Partial" or "None".

- All: Provides all access to all modules
- None: Provides no access to any modules
- Partial: Permits selection of access types by module.

(See Adding or editing access rights for an employee group[345])

9.3.3.3 Creating an employee group

1. Click on **Management->Employee Group** from the Main window.
2. Click on **Edit->Add**.
3. Name the employee group, and set the access rights to All or Partial
4. If the access rights are set to Partial, select which access rights to add[345]
5. Click on the **Accept** button when finished.

9.3.3.4 Adding or editing access rights for an employee group

Note that employee groups are created to provide access rights required to perform a role. If an employee has multiple roles, they will be assigned to multiple employee groups.

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See the following topics for more information on employee groups or employee rights :

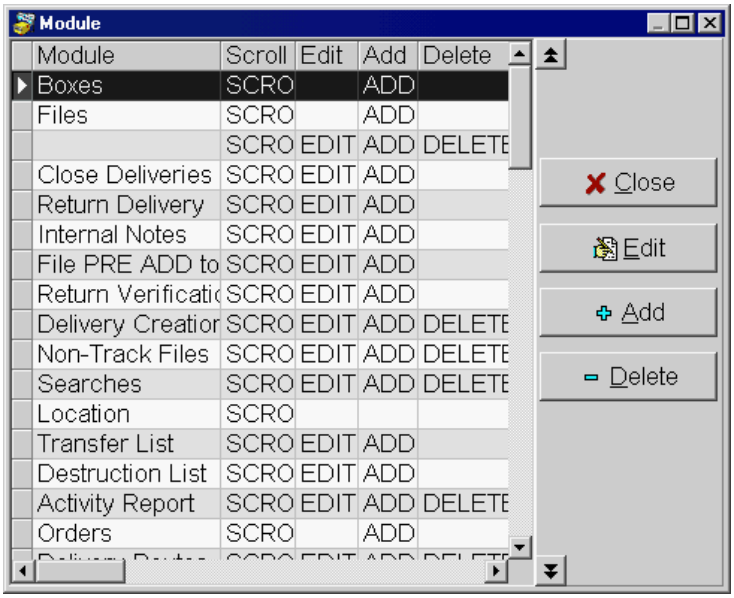
- Creating an employee group[345]
- Adding or editing access rights for an employee[340]

Usually, employee groups are created to fit certain job descriptions (ex: secretary, warehouse employee, driver, warehouse manager, etc.) Each group should reflect the use most of the employees of the group will have for the software.

Here is an example of access rights for a secretary (take note that this might not be adapted to your business' needs) :

MODULE	RIGHTS
Order	Add, Scroll, Edit
Box	Add, Scroll, Edit
File	Add, Scroll, Edit
Delivery Imaging	Add, Scroll, Edit
Recurring Orders	Add, Scroll, Edit
Search	Add, Scroll, Edit, Delete
Full Text Search	Add, Scroll, Edit
Rotation Schedule	Add, Scroll, Edit, Delete

1 Click on **Management**->**Employee Group** from the Main window.
2 Search for the employee group whose access rights must be defined or edited.
3 When the employee group appears on the screen click on **Edit**->**Edit**.
4 Move to the Modules field, click on the choice button to the right of the field and set it to "All" or "None", depending if the employee group must have access to all the modules or none;
5 To give access to some modules, set the field to "Partial" then click to the drop-down button to the far right of the field. A window appears, containing the modules already granted to the group, including the access rights to these modules.



6 Add or edit the rights as follows :

- To add access to a module click on the **Add** button. A choice list appears.

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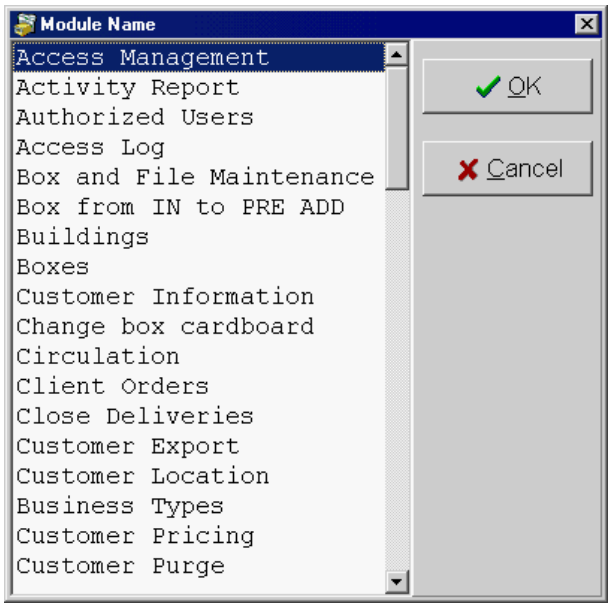
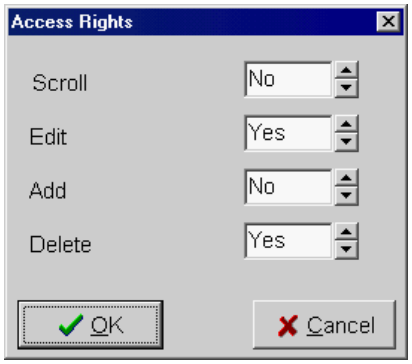


Select a module and press **OK**. A window is displayed and allows to specify the access rights to the module.



Click on the choice button to the right of each field, set to "Yes" the desired fields and press **OK**. The module and its access rights will appear in the window opened in **5**.

- To remove the access to a module select it and click on the **Delete** button. Click on the **Yes** button of the dialog box that is displayed to confirm the operation.

7 Click on the **Accept** button of the module when finished.

9.3.3.5 Copying and adding an employee group

To create an employee group with similar access rights to an existing group, use the copy and add function.

1. Open the **Management**->**Employee** module.
2. Navigate to the employee group to copy from.
3. Click on **Edit**->**Copy and Add**.
4. Enter the name of the new group, and modify the access rights 345 if desired.

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5. To complete the operation click on the **Accept** button.

9.3.3.6 Deleting an employee group

1. Click on **Management**->**Employee Group** from the Main window.
2. Search the employee group to be deleted.
3. When the desired employee group is on the screen click on **Edit**->**Delete**. The employee group is removed from the system.

Note : The system will prevent you from deleting a group if it is used.

9.3.3.7 Viewing or printing the list of all employee groups

1 Click on **Management**->**Employee Group** from the Main window.
2 Click on **File**->**View report**|**Print report**.
3 The list of all the employee groups for the record center is automatically displayed or printed by the system.

9.3.3.8 Viewing the list of employees belonging to a group

To view the list of employees belonging to an employee group:
1. Open the **Management->Employee Group** module.
2. Navigate to the desired group
3. From the menu, select **View->View employees**. A report appears.

9.3.4 Delivery Vehicle

9.3.4.1 Overview (Delivery Vehicle)

The Management->Delivery Vehicle module enables you to create a list of delivery vehicles for use on delivery routes[639].

Available reports

- list of delivery vehicles

Fields (See next section[349])

Tasks

- Adding a delivery vehicle[349]
- Removing a delivery vehicle from the list[349]
- Viewing or printing the list of all the delivery vehicles[350]

Distinctive menu options:

File
- Print transit location labels

Module window:

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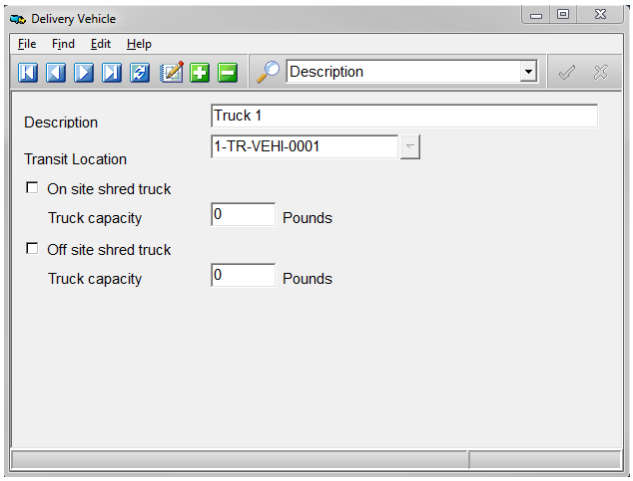

9.3.4.2 Fields (Delivery Vehicle)

Description

This description of the vehicle must be unique. It is used in drop-down lists such as in the delivery route module where you must select which delivery vehicle will be used to perform the trip.

Transit location

Select a transit location[354] associated to the vehicle.

On site shred truck, capacity (Pounds)

If this vehicle is to be used for on site shredding, check this check box and indicate the capacity (e.g. 6000 lbs.)
The capacity is used by the shredding calendar to help you track estimates of how full the truck will be based on currently scheduled work.

Note that if you use Kg instead of Pounds at your record center, you may change this in the Dictionary module.

Off site shred truck, capacity (Pounds)

If this vehicle is to collect material for off site shredding, then check this check box and indicate the carrying capacity.

9.3.4.3 Adding a delivery vehicle

1. Click on **Management**->**Delivery Vehicle** from the Main window.
2. Click on **Edit**->**Add**.
3. Enter a description for the new vehicle.
4. Assign a transit location to the vehicle.
5. Click on the **Accept** button.

9.3.4.4 Removing a delivery vehicle from the list

When a vehicle is not used anymore for deliveries by the record center it can be judicious to proceed to its removal from the list of vehicles that are still in activity.

1. Click on **Management**->**Delivery Vehicle** from the Main window.

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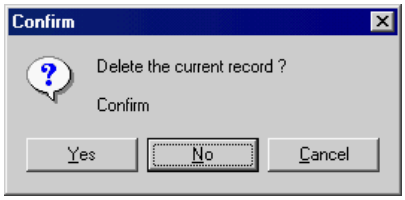
2 Find the vehicle to be removed.
3 Keep it on the screen and click on **Edit**->**Delete**. A dialog box appears.



4 Click on the **Yes** button in order to confirm the operation. From now on, this vehicle will not appear in the current module or on the list associated with the Vehicle field from the Delivery Route module.

9.3.4.5 Viewing or printing the list of all the delivery vehicles

1 Click on **Management**->**Delivery Vehicle** from the Main window.
2 Click on **File**->**View report**|**Print report**.
3 The list of all the delivery vehicles is automatically displayed or printed by the system.

9.3.5 Business Type

9.3.5.1 Overview (Business Type)

This module creates a list of business types for classifying customers[252] in the Customer->Customer Information[246] module. This information can be used in reports[501] for analysis, and can also be used in searching for customers when generating mailing lists or applying rate increases.

Available reports

- list of business types

Fields

- **Code:** 3 alphanumeric characters identifying the business type
- **Description:** A longer description of the business type, up to 40 characters.

Tasks

- Adding or editing a business type[351]
- Viewing or printing the list of all business types[351]

Distinctive menu options:

- (None)

Module window:

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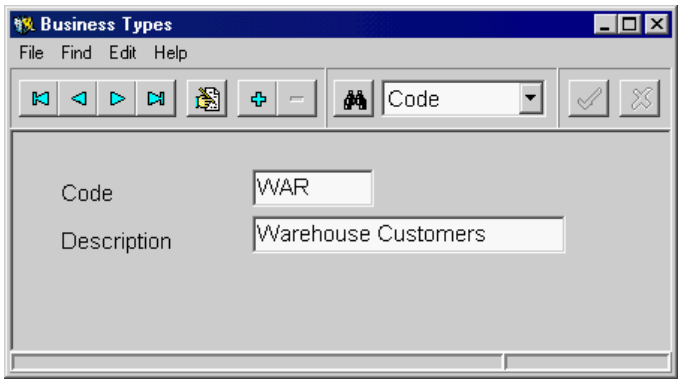

9.3.5.2 Adding or editing a business type

1. Click on **Management**->**Business Type** from the Main window.
2. Click on **Edit**->**Add**|**Edit**, respectively to add or edit a business type.
3. Move to the Code field and enter or modify the code that will be used everywhere in the system to identify the business type.
4. Move to the Description field and enter or modify the description that will give the summary description of the business type.
5. Click on the **Accept** button.

9.3.5.3 Viewing or printing the list of all business types

1. Click on **Management**->**Business Type** from the Main window.
2. Click on **File**->**View Report**|**Print Report**.
3. The list of all the business types is automatically displayed or printed from the default printer.

9.3.6 Holidays

9.3.6.1 Overview (Holidays)

Entering dates in this module will prevent EDC RC from allowing deliveries to be scheduled when the record center is closed dues to holidays. This is especially necessary if your record center offers tape rotation[493] service. Holidays should be entered at least as far into the future as rotation schedules are entered. If a customer has their own specific holidays, these should be entered in the Customer->Customer Holidays[335] module.

Available reports

- list of holidays

Fields[352] (see the next section)

Tasks

- Adding or editing a holiday[352]
- Deleting a holiday[352]
- Viewing or printing the list of all holidays[353]

Distinctive menu options:

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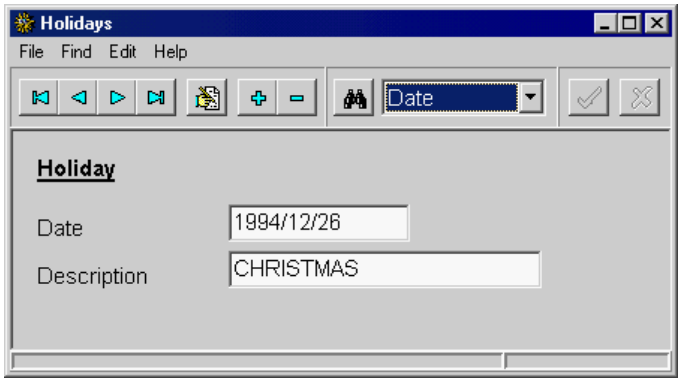
- (None)

Module window:



9.3.6.2 Fields (Holidays)

Holiday
Date
Field with predefined date mask that allows to specify the date when the record center will be closed. The date will respect the Date Mask specified in the System Information module.

Description
This field allows to clearly identify the holiday. This description generally corresponds to the usual denomination of the day, such as "Christmas" or "New Year's".

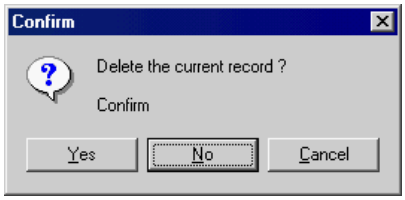
9.3.6.3 Adding or editing a holiday

1. Click on **Management**->**Holiday** from the Main window.
2. Click on **Edit**->**Add**|**Edit**.
3. Move to the Date field and enter or modify the date when the record center will be closed.
4. Move to the Description field and enter or modify the description of the holiday.
5. Click on the **Accept** button when finished.

Note : The system allows to enter only one holiday for the same date, even if descriptions are different.

9.3.6.4 Deleting a holiday

1. Click on **Management**->**Holiday** from the Main window.
2. Find the holiday to be deleted.
3. Keep it on the screen and click on **Edit**->**Delete**. A dialog box appears.



4. Click on the **Yes** button to confirm the deletion.

Note : As soon as a holiday is deleted, it automatically becomes a potential delivery date.

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9.3.6.5 Viewing or printing the list of all holidays

1. Click on **Management**->**Holiday** from the Main window.
2. Click on **File**->**View report**|**Print report**.
3. The list of all the holidays is automatically displayed or printed from the default printer.

9.3.7 Building

9.3.7.1 Overview (Building)

A record center may have multiple storage buildings in different cities, requiring separate picking lists, rush order paging systems, and transit locations. The Management->Building module is used to manage many of these building-specific parameters.

Available reports

- list of buildings

Fields[354] (see the next section)

Tasks

- Adding or editing a building[356]
- Deleting a building[356]
- Printing or exporting transit location labels[357]
- Viewing or printing the list of all buildings[358]
- Modifying pager options for rush orders[358]

Distinctive menu options:

File menu

- Print transit location labels (Laser | Thermal | Export to file)[357]

Module window:

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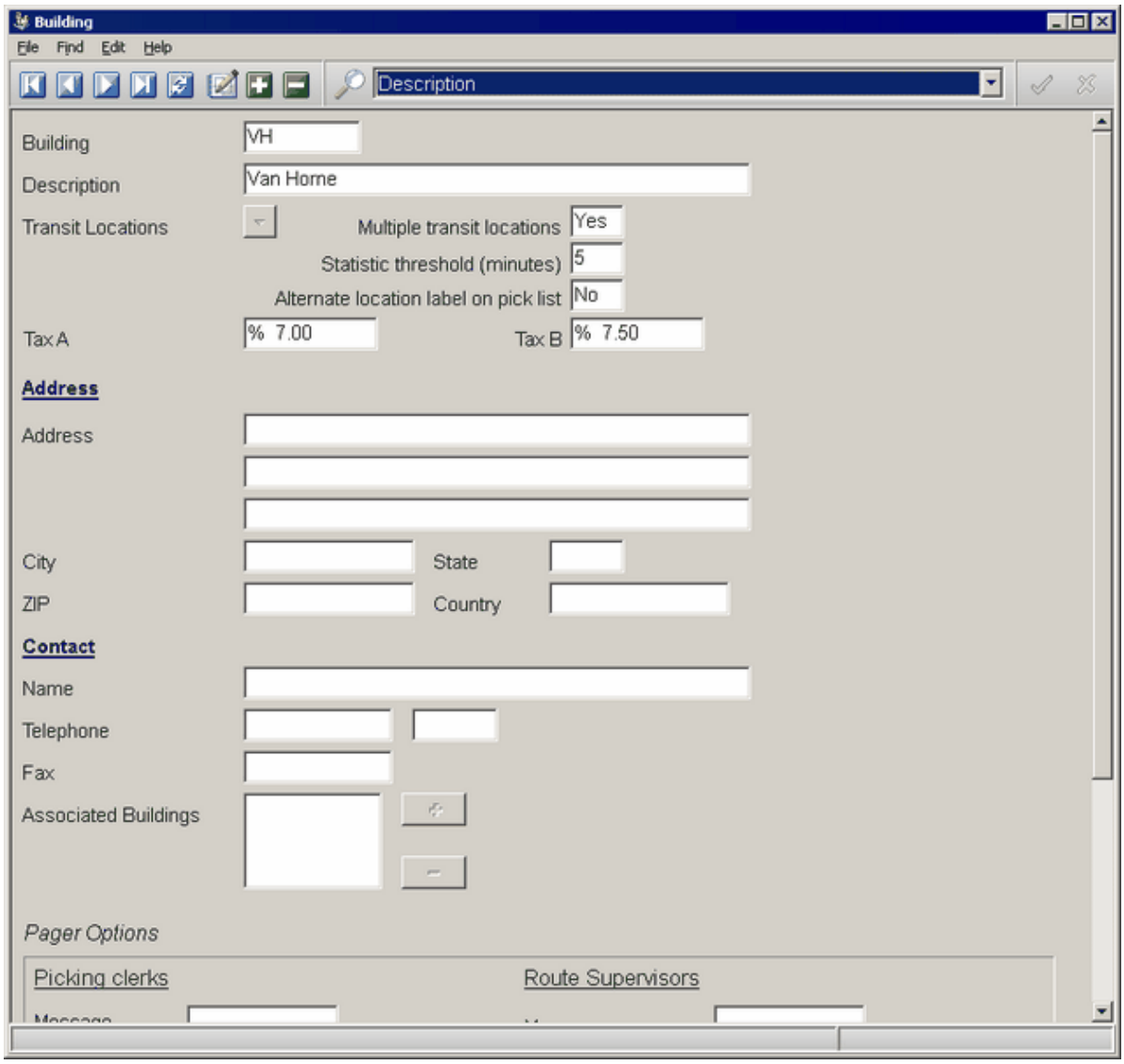

9.3.7.2 Fields (Building)

Building

Enter a unique code for each building of the record center. This is typically one but sometimes two characters long. EDC will correct you if it does not match the location mask established in the system information module.

Description

Enter an optional brief description for each building. Possible suggestions include the city or street where the building is located.

Transit Locations

Click this drop-down box to create or edit a list of transit locations. Transit locations are temporary locations where items may rest before going to a permanent location. Examples include delivery vehicles, receiving and shipping areas, and bins used for collecting files for re-filing in batches.

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Multiple Transit Locations
If this field is set to "No", the default transit location (the first one when sorted alphabetically) will be used whenever a transit location is required. Otherwise, you will be prompted to select a transit location from the list.

Statistic threshold
This numeric field determines the number of minutes the PDT will stay open for statistics to be relevant. Ex: if the field is set to five and the PDT is not used for more than five minutes, the scanning before and the scanning after are considered as separate actions instead of a continuous action. Later, the statistics will be calculated according to both scanning periods.

One would set up a 10 minutes threshold if one has many spaces available and the refiling or the move can be done quickly. If, instead, the warehouse is very big and the available spaces are sparse, then it might be more logical to put it to 20 or 30 minutes.

Alternate location label on pick list
When "Yes", the alternate location label will be included on the picking list. There is a related option to display alternate location labels on the PDT, found on the 4-Utilities menu.

Tax A, B
Numeric field specifying a percentage value for the tax A and B for customers that are associated to this building (Building in the options section, not the Billing Building).

Note : The name of the taxes (A and B) should be modified through the Dictionary module to match the taxes in effect in your region.

Address
Address/City/Postal Code/Province/Country

These fields allow to enter the main address of the building.

Contact
Name/Telephone/Fax

These fields allow to enter the name of the person responsible for each building and its contact coordinates. This person is usually the warehouse manager.

Associated Buildings
This field is used to specify if other buildings are associated with the current building. The settings of this field will have an impact on delivery creation for regular orders and on picking lists. The system will automatically create deliveries and picking lists for the current building and its associated buildings. This can be useful when implanting a new building that is not yet fully staffed.

Here is a comparative chart of the main differences between separate and associated buildings:

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	ASSOCIATED BUILDINGS		SEPARATE BUILDINGS	
	Same building	Other building	Same building	Other building
INVENTORY				
Edit box information	yes	yes	yes	yes
Edit box location	yes	no	yes	no
PICK AND RUN				
Download pick and run	yes	no	yes	no
CIRCULATION				
Creating an order	yes	yes	yes	yes
Picking items	yes	yes	yes	no
Creating a delivery	yes	yes	yes	no
Closing a delivery	yes	no	yes	no
Downloading/uploading truck validation	yes	yes	yes	yes
Downloading deliveries	yes	yes	yes	yes
Returning deliveries	yes	yes	yes	yes
* When buildings are associated, the transit locations are not shared				

Pager options
These field are described in detail in the section on Setting pager options[358].

Map settings
If you optimize a route originating from this building and are set up for MapQuest integration, EDCRC should automatically find the address of your record center, filling in the Latitude and Longitude and locating it graphically on the map below.

Find address
Clicking on this button will instruct EDCRC to re-geocode your building, looking up its longitude and latitude coordinates using MapQuest.

Latitude / Longitude / Refresh map
If for any reason looking up your building does not produce the correct coordinates, you may adjust them manually here. Click the "Refresh map" button to display the position of the new coordinates on the map.

9.3.7.3 Adding or editing a building

1. Open the **Management->Building** module.
2. From the menu, select **Edit->Add|Edit**.
3. Enter or modify information in the appropriate fields[354].
4. Click on the **Accept** button when finished.

Note : Each building must have at least one transit location. Click the **Transit Location** drop-down field to view, add or delete these.

9.3.7.4 Deleting a building

The deletion of a building can be necessary, especially when the record center decides to centralize its operations in one area or when an old building is sold. The record center has to insure that no documents will be checked as being stored at a building which is not operational anymore or which doesn't belong to the record center.

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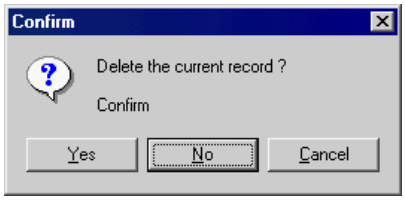
1 Click on **Management**->**Building** from the Main window.
2 Search the building to be deleted.
3 When the desired building is displayed on the screen click on **Edit**->**Delete**. A dialog box appears.



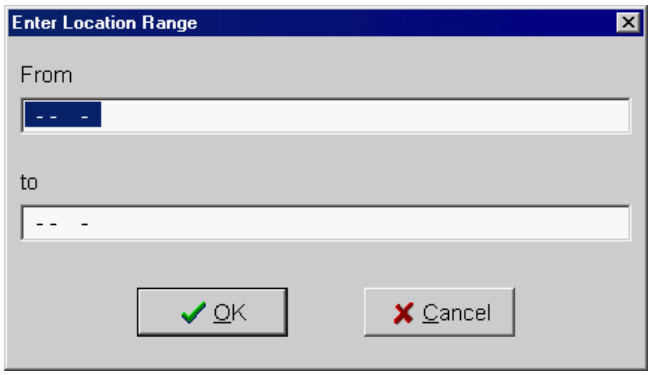
4 Click on the **Yes** button to confirm the deletion. The system will proceed automatically.

Note : In order to be deleted from the system, a building must not have any defined location or must not be granted to a customer. In that situation, the Customer Information and the Location modules have to be opened and modified consequently. Locations must also be emptied before being able to delete them.

9.3.7.5 Printing or exporting transit location labels

Printing transit location labels

1 Click on **Management**->**Building** from the Main window.
2 Click on **File**->**Print transit location labels**->**Laser**|**Thermal**. A window appears.



3 Enter an interval of locations and press **OK**.
4 A window appears asking which label the first label should be. Example : if you only want to start printing from the third space on your page you would enter the number three in the field.
5 Press **OK**. The system automatically prints the labels on the default laser printer or on the thermal printer attached to the workstation.

Note : The system does not print all the location included in the interval entered in **2**. It only prints the locations defined as transit locations.

Exporting transit location labels

A record center may decide to have a third party print its transit location labels. With this operation, the record center can simply send the transit location numbers to the third party by email with a text file attached.

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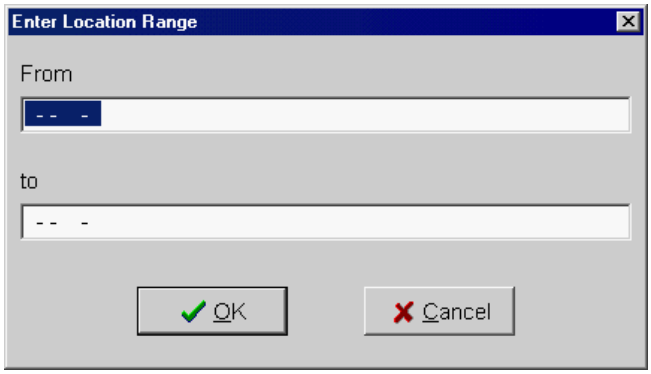
1 Click on **Management**->**Building** from the Main window.
2 Click on **File**->**Print transit location labels**->**Export to file**. A window appears, different for each workstation, and asks to enter a file name and directory.
3 Enter a name and select a directory for the text file then click on the **Save** button (or **Enter**, etc). A window opens.



4 Enter an interval of locations and press **OK**. The transit locations included in the interval are automatically exported to the text file.

9.3.7.6 Viewing or printing the list of all buildings

1. Click on **Management->Building** from the Main window.
2. Click on **File->View report|Print report**.
3. The list of all the buildings will be automatically displayed or printed.

9.3.7.7 Setting pager options

While it is most efficient to pick orders in batch, orders that have delivery ship modes[724] of by time, half day rush, or 24 hours require more urgent attention. When such orders are placed, EDC sends notifications to e-mail addresses which may be specified in the pager options section.

Notes :

- Except for the 24-hour ship mode, notifications will only be sent within business hours[372] and the margins[372] before and after, as specified in the Management->System Information module.
- Notification will not be sent for delivery types with 24-hour ship mode unless the 24-hour paging[369] option is on. Some record centers turn this option off and require that customers place after hours rush orders by phone.

1. Open the **Management->Building** module.
2. Press **Ctrl-E** to edit, or click the **Edit** button.
3. Scroll down to the Paging Options section

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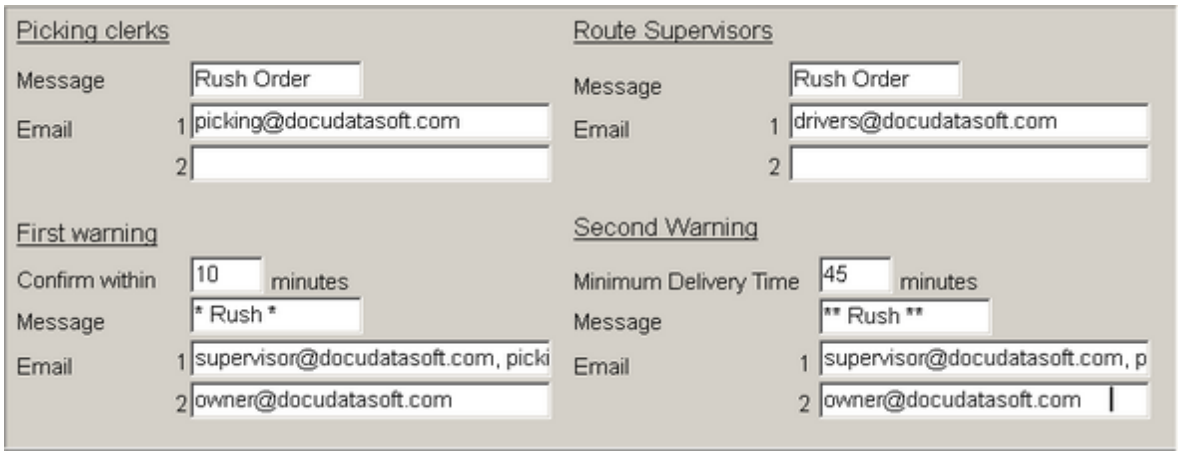

4. Set **messages**, **e-mail** addresses, and **time thresholds** as follows: (Note that multiple e-mail addresses may be separated by commas on the same line.)

Picking clerks and Route supervisors:
These messages are sent as soon as the order is confirmed, notifying the picking clerk that an items is to be picked, and the route supervisor that a vehicle will be required to perform the delivery

First warning:
This message is sent after the specified number of minutes if the picking list for this order has not yet been sent to a PDT. This might occur if the picking clerk is in an area of the building that does not have good wireless reception and did not receive the notification.

Second warning:
This is sent if the picking is not completed and results uploaded within the specified time of the delivery deadline. This might occur if there is a problem with the picking, or if neither the original message nor the first warning were received and acted on.

5. Press **Ctrl-Enter** or click the green **accept** button once done.

9.3.8 Dictionary

9.3.8.1 Select which dictionary (customer or main) to work with

When you open the Management->Dictionary, it opens by default to the main record center dictionary, which contains terms used at the record center, and also for communication with the clients - if their specific terms have not been overridden.

To work with customer-specific terms:

- Open the **Management->Dictionary** module.
- At the top of the window, click on the **More** button.
- From the menu that appears, select, **Open customer dictionary**.
- Type the customer key of the account that you wish to work with and click **Okay**.

The dictionary will look very similar, but the title of the window will now say Dictionary - [CustKey]

Note: If you wish to modify box, file, or document field names, it is best to this through ActiveWeb or through the Customer->Customer Information module. See Field definitions (Box | File |284 Copy field definitions to other customers288)284

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To work with main dictionary after modifying customer-specific terms:

If a customer key is not listed after the word "Dictionary" in the window title, then you are already in the main dictionary, and the following steps are unnecessary.

- At the top of the window of the **Management->Dictionary** module, click on the **More** button.
- From the menu that appears, select, **Open main dictionary**.
- The main dictionary will be loaded.

9.3.8.2 Overview (Dictionary)

The dictionary module controls all of the terms used by EDCRC, ActiveWeb, and rcMobile, permitting record centers around the world to use EDCRC in their own language.

Note that opening this module loads the entire dictionary into memory, therefore it may be slow to open, especially if your network or computer is slow. If you need to make many changes to your dictionary, it might therefore be best to do it from your server.

Clicking a column header will sort the table alphabetically by that field.

Available reports

- None. (See the Report[501] module)

Fields

- **Number:** String number, according to which the terms were added to EDCRC. You can search for a string by number by typing in the string number at the top. If you are translating terms into a different language then going to the highest string numbers will enable you translate any terms added since your previous software update.
- **English, French:** The terms used at your record center, in the corresponding language. (You may use different languages.)
- **Tape:** If this check box is checked, the alternate terms (English - tape, French - Tape), will be used in ActiveWeb and client communications for tape-only accounts.
- **Comment:** A comment used by the programmers to give an indication of how the string is used.

Tasks

- Select which dictionary (customer or main) to work with[359]
- Modify terms used in EDCRC[361]

Distinctive options and buttons:

Search (by string number)
Search and replace:

More
- Open (customer | main) dictionary

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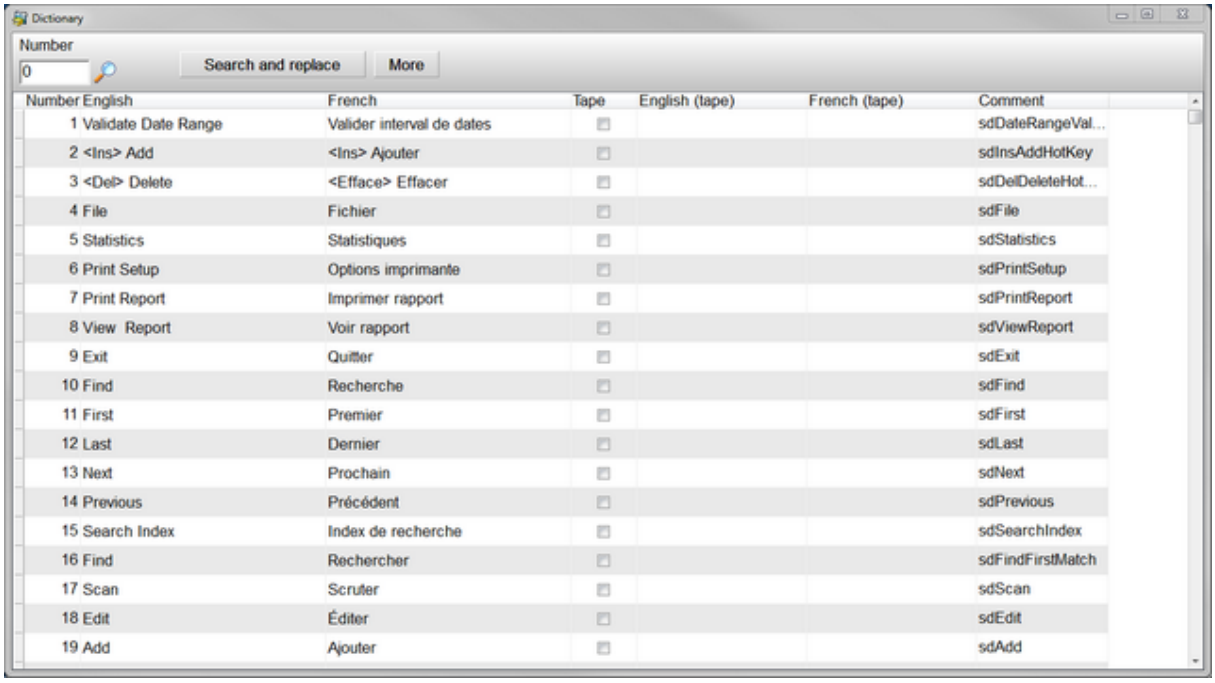
- Change bilingual strings to (English | French) only

Related topics

- Links[475] to topics, may be not on menus, may be cross-reference of those that are.

Module window:



9.3.8.3 Modify terms used in EDCRC

EDCRC uses a dictionary to store the various terms in use. You can change the terms used by EDCRC by changing the terms in the dictionary, but be careful for the following reasons:

- Some dictionary entries are used in multiple places, especially older terms. (with lower string numbers).
- Changing key terms away from the EDCRC defaults means that your interface will no longer exactly match this manual.

Changing a specific string, by string number:

- Open the **Management->Dictionary** module.
- Type the **number** in the number text field, and click the **magnifying glass**
- The list will position to the desired term.
- Replace the term (usually in the "English" column) with the new value that should be used.

Finding a string directly in the list

You may also scroll through the list to find your desired term.
Clicking on a column header will cause the list to sort by that column. Note that the sort is by the value of the character, therefore the sort order with a Latin character set would be:

- Blank

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- Standard symbols
- 0-9
- A-Z
- a-z

For new databases, DocuData will often add a prefix of zz_ to strings that a record center should modify during configuration, so that you can find these easily by sorting alphabetically and going to the bottom of the list.

Finding and (optionally) modifying strings using find and replace.
For a list of commonly-modified strings, see Commonly modified dictionary strings[852] .
Please contact support@docudatasoft.com if you require further information.

9.3.9 Access Log

9.3.9.1 Overview (Access Log)

The access log tracks who is accessing the system by EDC RC, ActiveFile, and ActiveWeb.

Sessions can be terminated in this module, and also using the Access Management program, DcLock32.exe, which is in the bin directory.

Available reports

- Access log for a specific period, for all customers[363]

Fields[363] (see the next section)

Tasks

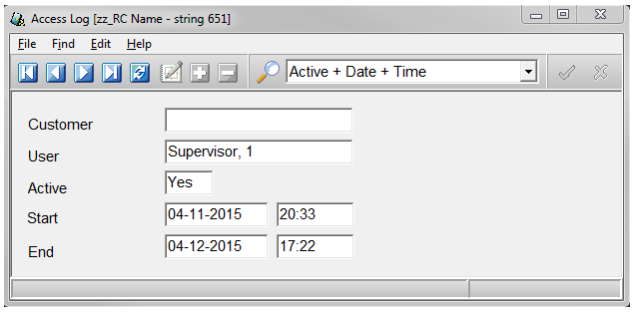
- Terminating an active session[363]
- Viewing or printing the access log[363]

Distinctive menu options:

Edit menu

- Terminate session[363]

Module window:



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9.3.9.2 Fields (Access Log)

Customer
If the access event is by a customer through ActiveWeb, the customer key is displayed here. If the access event is by a record centre employee through EDCRC then this field remains empty.

User
Indicates the user's name.

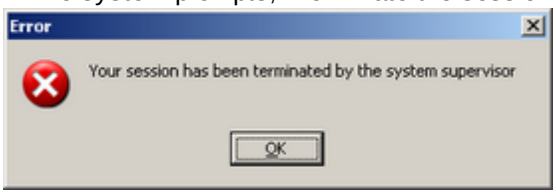
Active
"Yes"indicates that the user is currently using EDC.

Start
Start date and time of the selected session.

End
End date and time of the selected session.
For an active session, this field indicates the current date and time.

9.3.9.3 Terminating an active session

1. Open the **Management->Access Log** module
2. Navigate to the desired session.
3. From the menu select **Edit->Terminate session**.
4. The system prompts, "Terminate the session of the user? Confirm?". Click **Yes**.

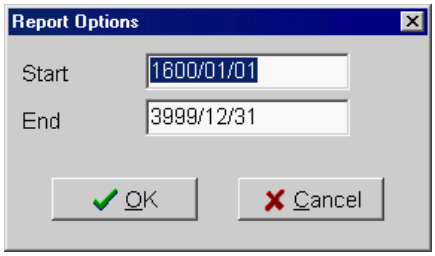


5. If the user was active, they will see the above message, and their session will close.

Note that active web sessions can be managed from the menu option on the main window[244].

9.3.9.4 Viewing or printing the access log

1 Click on **Management**->**Access Log** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. A dialog box appears.



3 Enter an interval of dates for which the report has to be produced and press **OK**. The report is automatically displayed or printed.

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9.3.10 System Information

9.3.10.1 Overview (System Information Module)

The Management->System Information module contains parameters to tailor the behavior of EDC RC to the needs of your specific record center.

Available reports

- Partial summary of system information parameters.[376]

Fields[365] (see the next section)

Tasks

- Editing system information[376]
- Creating the exclusion list for deliveries[378]
- Viewing or printing system information[376]

Distinctive menu options:

File menu

- Configure PDT[375]
- Purge error log[376]
- Deploy ActiveWeb (See technical manual)
- Deploy ActiveWeb portal (See technical manual)
- Deploy rcMobile ***

Edit menu

- Delivery notes[377]
- Delivery exclusion list[378]
- Global invoice note[379]
- Default invoice template[380]
- Delivery totals report template[380]
- Client software trial email[381]
- Label templates[382]
- Document separator pages[383]
- Subcontractor record centers[110]
- Contract holder record center passwords[113]
- Unlock operation[384]
- Image directory[385]
- Documents directory[385]

Report menu

- Record center | Customer -> Box | File report fields[386] Changing list layouts and setting the default report

Module window:

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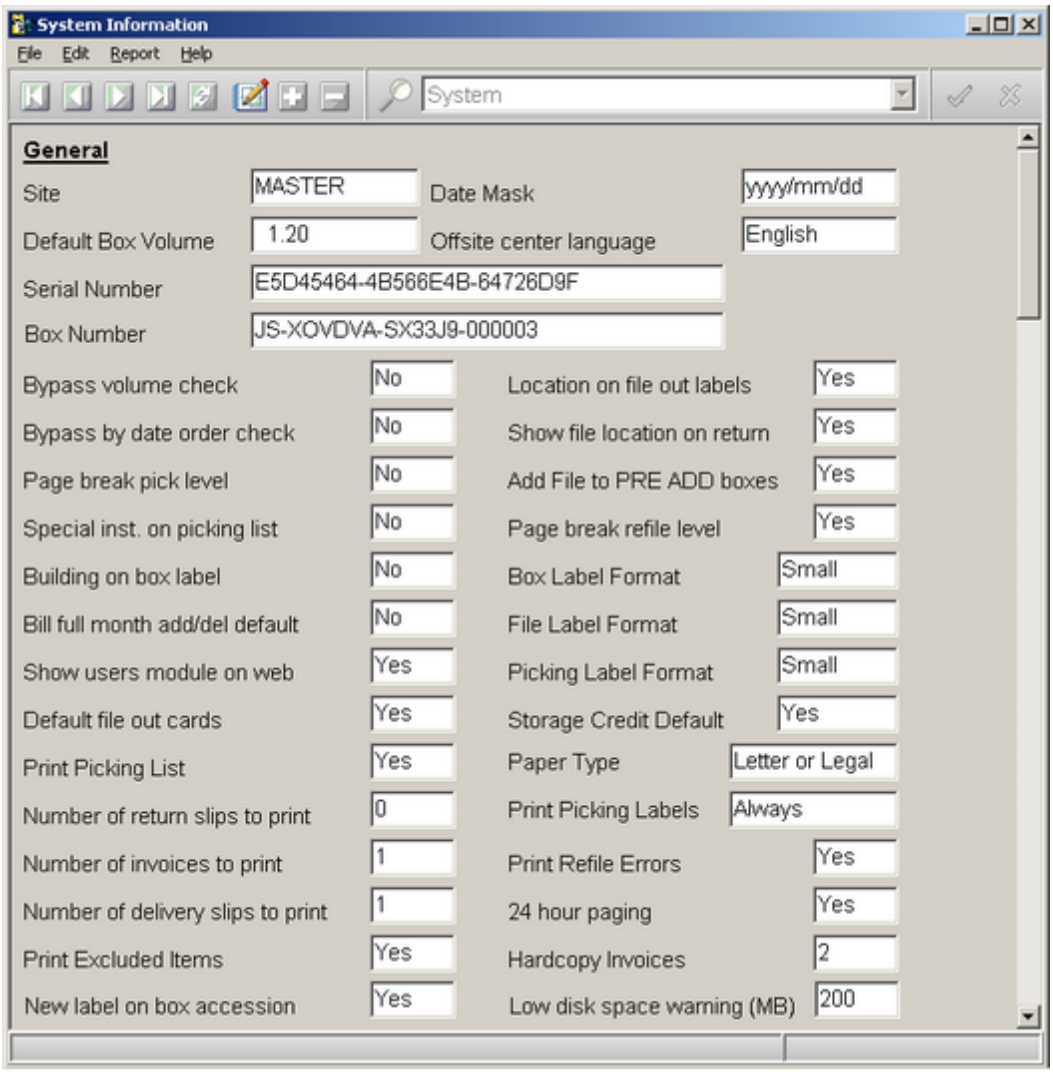
System Information
File Edit Report Help
System
General
Site MASTER
Date Mask yyyy/mm/dd
Default Box Volume 1.20
Offsite center language English
Serial Number E5D45464-4B566E4B-64726D9F
Box Number JS-XOVDVA-SX33J9-000003
Bypass volume check No
Bypass by date order check No
Page break pick level No
Special inst. on picking list No
Building on box label No
Bill full month add/del default No
Show users module on web Yes
Default file out cards Yes
Print Picking List Yes
Number of return slips to print 0
Number of invoices to print 1
Number of delivery slips to print 1
Print Excluded Items Yes
New label on box accession Yes
Location on file out labels Yes
Show file location on return Yes
Add File to PRE ADD boxes Yes
Page break refile level Yes
Box Label Format Small
File Label Format Small
Picking Label Format Small
Storage Credit Default Yes
Paper Type Letter or Legal
Print Picking Labels Always
Print Refile Errors Yes
24 hour paging Yes
Hardcopy Invoices 2
Low disk space warning (MB) 200

9.3.10.2 Fields (System Information Module)

General

Site
This is the data site. This field is set for "MASTER" at the off-site record center and "CLIENT" at the in-house record center for customers who use EDC.

Date Mask
Mask of the date format used throughout the system.

Default Box Volume
Numeric field used to assign a default box volume to boxes in the PRE ADD[866] state. If customers use box types (which is standard practice), this value should match the volume assigned to the most common box type, in the Box type module. The box type of each box could be modified manually in the Box module.

Off site center language
Choice field containing the two languages defined in the Dictionary module.
This field indicates the display language of the EDC software at the off-site record center.

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Serial Number
This number helps the technical support people by providing some important information about the software. The serial number must be modified if the amount of users or the level of functions is changed.

Box Number
This number must be modified if the maximum number of boxes that can be tracked by EDC is altered, by contacting DocuData.

Admin e-mail

*** If the database that hosts the images and electronic files in ActiveWeb encounters errors, it sends an e-mail notification to the administrator. This e-mail address is configured at the top of the System Information module.

Bypass volume check
Choice field containing "Yes" or "No".
When this field is set to "No", the system checks if the volume (associated to the box type) of a box corresponds to the location volume.

Location on file out labels
Choice field containing "Yes" or "No".
When this field is set to "Yes", the portion of labels printed and affixed on files when they are retrieved from inventory will indicate the location of the box they belong to. This will make the return of files more efficient.

Bypass by date order check
Choice field containing "Yes" or "No".
When this field is set to "No", the system has to take into account the picking times when placing orders by date.
For example, when the field Afternoon picking time is set to "16h05" and an order by date for the next morning is placed at 16h06, the system will not accept the order. It will consider that the order has to be delivered the next afternoon or the day after, according to deliveries that can be either on a half-day or a daily basis (see the Delivery Cycle field for more details).

Show file location on return
Choice field that can contain"Yes" or "No".
If this field is set to "Yes", an information box will appear when returning a file in the Return Delivery module and will indicate the file location.

Page break pick level
Choice field containing "Yes" or "No".
When setting this field to "Yes", it allows to separate the picking lists (created in the Pick List module) in several pages when they contain documents stored on different levels (or floors, or sections, etc) at the record center. For example, if a record center has several floors, the documents to be picked on the first floor will appear on one page, the documents to be picked on the 3rd floor will appear on another page, etc.

Add file to PRE ADD boxes
Choice field that can contain "Yes" or "No".
When this field is set to "Yes", the system will automatically add a PRE ADD file when generating PRE ADD boxes. This setting is usually set to "Yes" when clients want to use imaging for boxes that don't necessarily have files in them. This is done because the software does not allow imaging without a file.

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Special inst. on picking list
Choice field containing "Yes" or "No".
When this field is set to "Yes", a new column is added to paper picking list reports. This column is called Note and if the order of the item has special instructions, the column will indicate "*001", for example, where "001" is a footnote to identify the special instructions which will be printed at the end of the picking list.

Page break refile level
Choice field containing "Yes" or "No".
When setting this field to "Yes", it allows to separate the refile lists (created in the Return Delivery module) in several pages when they contain documents stored on different levels (or floors, or sections, etc) at the record center. For example, if a record center has several floors, the documents to be refiled on the first floor will appear on one page, the documents to be refiled on the 3rd floor will appear on another page, etc.

Building on box label
Choice field containing "Yes" or "No".
When this field is set to "Yes", labels printed and affixed on boxes will indicate the building they belong to. If the box is moved to another building, it is the staff's responsibility to print a new label.

Box Label Format (Applies to older thermal printers)
Choice field containing "Regular", "Small" or "Extra small".
This field allows to select the format that will be used by default when printing box labels. These labels essentially contain the box number and bar code, its description and the code of the customer to which the box belongs.

Size of formats
- Very Small : ½" x 3"
- Small : 1" x 3"½
- Perforated : 6" x 3"½

Bill full month add / del default
Choice field containing "Yes" or "No".
When this field is set to "Yes", the rent for new boxes is charged for the entire month.
For example, if a box is added on the last day of the month, rent is charged for the entire month. If a customer is billed every three months, some new boxes may be billed for more than one month, depending on the month of the billing period they were entered.

File Label Format (Applies to older thermal printers)
Choice field containing "Regular" or "Small".
This field allows to select the format that will be used by default when printing file labels. These labels essentially contain the file bar code and number (if such is the case), its description, the box number where the file is located and the code of the customer to which the file belongs.

Size of formats
- Small : 1" x 3"½
- Regular : 2" x 4"

Show user module on Web
Choice field containing "Yes" or "No".
When this field is set to "No", the User module will not be available on ActiveWeb. This field should be set to "no" all the time if the record center wants to strictly control the access rights to orders for its customers.

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Picking Label Format (Applies to older thermal printers)
Choice field that can contain "Small" or "Perforated".
This field is efficient only when the field Print Picking Labels is set to "Yes" in the current module.
This field allows to select the format that will be used by default when printing picking labels.

Size of formats
- Small : 1" x 3"½
- Perforated : 3"½ x 6 " (2 parts that can be separated/perforations in the middle).

Note: Picking labels apply to all labels printed at picking time, ie:

Auto inventoried file label, File out label (same label)
File out card label
Box address label
Container address label (not done yet)

Default file out cards
Choice field that can contain "Yes" or "No".
When this field is set to "Yes", the option to print file out cards is automatically activated for any new customer added in the system (see the field File out cards[248] in the Customer Information module).

Storage Credit Default
Choice field containing "Yes" or "No".
When this field is set to "Yes", the customer will be credited the next month for the cancellation of space usage when deleting, transferring and destroying boxes. This will only work if the "Charge rent" field is set to Forward in the Customer information[248] module

Max web failed logins

If a user exceeds this number of login attempts (i.e. incorrect passwords) within a ten-minute period, their profile is made inactive. To reactivate the profile, you can set Active=Yes for the user in the Authorized users[304] module.

Paper Type
Choice field that can contain "Letter or Legal" or "A4".
This field allows to choose the paper type for producing reports in the system.

***Number of Return Slips to Print**
Numeric field that can contain numbers from 0 to 99.
The system will automatically print the number of return slips indicated in this field.

Print Picking Labels
Choice field that can contain "Always", "Never" or "PRE ADD Only".
If this field is set to "Always" (or "Never"), the system automatically prints (or does not print at all) the labels for files when creating a picking list. If this field is set to "PRE ADD Only", the system only prints labels for the items in PRE ADD.

***Number of Invoices to Print**
Numeric field that can contain numbers from 0 to 99.
The system will automatically print the number of invoices indicated in this field.

Print Refile Errors
Choice field containing "Yes" or "No".

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When this field is set to "Yes", the system automatically prints a report of the refilling errors after a delivery has been returned.

***Number of Delivery Slips to Print**
Numeric field that can contain numbers from 0 to 99.
The system will automatically print the number of delivery slips indicated in this field.

24 hour paging
Choice field containing "Yes" or "No".
When this field is set to "Yes", the paging system for orders by delay (the order monitor) is also activated for orders whose delivery type is in 24 hours mode. This means that the order monitor will send out emails or page the people in charge (defined in the Pager options[358]) for deliveries that have the delivery type Ship mode field set to 24 hour.

Print Excluded Items
Choice field that can contain "Yes" or "No".
When this field is set to "Yes", the system automatically prints the excluded items with delivery creation.

Hard copy Invoice
The number of paper invoices to print for customers that have the paper invoice option set to False.

New label on box accession
Choice field that can contain "Yes" or "No".
When this field is set to "Yes", the system' automatically prints a thermal label when a PRE-ADD box is initially brought into the record center on a return delivery. This is typically set to "Yes" if customers create boxes and print laser labels on ActiveWeb, and to "No" if the record center always issues pre-printed labels of new box accession.

Low disk space warning (MB)
Numeric field that can range from 0 to 99999.
If the available space remaining on the disk hosting the RC database drops below the specified number of megabytes, a warning message appears when users logon.

Service/supply cust key start, Service/supply cust key width, Service/supply template customer

When you set up a new account through the orders module, this account will be used for obtaining default settings as well as delivery type assignments and other parameters that are not requested by the wizard. This functionality is intended for quickly setting up accounts that do not require all of the options of a box storage account, but accounts can easily be transformed from service-only accounts to records storage accounts if you later manage to sell additional services to the client. ***

The accounts will have a customer key with the specified number of characters (width), and are numbered sequentially, starting with the customer key start.

Box Chg. Delivery Type
Choice field listing all defined delivery types. The selected delivery type will be used by the system in invoicing for the service of changing the cardboard of a box (either in the box module[458] or during the return of a delivery[647]); a single order is created with this delivery type, to bill this change to the customer. The order will be created for all boxes scanned per customer.

Since billing is based on deliveries, a free delivery type needs to be created, as well as a special price

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code. Here are the suggested settings for both the price code and delivery type :

Price code

Code : BCD
Description : Box Change Delivery
Units : Delivery
Price : 00.00
Group : Courier
Courier (check box) : Checked

Delivery Type

Description : Box Change Delivery
Price Code : BCD
Ship mode : Regular
Delivery within : 00:00
Courier : Record Center
Ordering: 10

Note: See also the Min.Touches Box Chg.Charge[254] field in the Customer Information module for additional information.

Scheduled order delivery type

Drop-down field associated to a list defined in the Delivery Type[722] module.
This is used for orders created with the Rotation Schedule module, and requires a delivery type that has ship mode "by date", with record center courier. It is used for deliveries created by the rotation schedule module.

The exact price codes that you use will depend on how you bill for shredding service, and whether you want these orders to become grouped with regular orders for the same delivery cycle and address.

Withdrawal list delivery type

Drop-down field associated to a list defined in the Delivery Type[722] module.
This is used for deliveries created to bill for disposal, transfer, and deletion list charges. Ship mode for this delivery type should be Regular, and Courier is generally External. Ensure that the delivery type has a No Charge price code for delivery handling, and no trip charge.

***Replication**

DocuData RPC Server

IP address of the DocuData server used when the system needs to receive information as well as send it to other EDC related systems (it becomes useful when generating web licenses, or communicating with a service record center. egg. services.docudatasoft.com)

Port

Represents the TCP/IP port for access to the DocuData server. This is typically 443 if SSL security is used, 11007 or 80 otherwise, depending on firewall settings. See the technical manual for more details.

Client installation folder

Directory where the customer data will automatically be exported, when using the ClientInstaller.exe application.

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RPC server at RC
External address (URL) or IP address of the record center's RPC server. This is were the replication and order requests will be sent to. Also specify the **port** number, and whether **SSL encryption** is used. This is frequently encrypted, since communication occurs over the internet.

Internal LAN
This internal address is used when viewing the replication log[443] in the Box and File Maintenance module. The software will verify when the replication was active at this specific address. Also specify the **port** number, and whether **SSL encryption** is used.

EDM Server
Electronic documents and images in EDCRC and ActiveWeb are stored using MongoDb. Specify the URL or IP address, as well as the port for accessing the EDM server. This will typically be within the same network.

MapQuest API key
You can obtain a MapQuest key by creating an account at http://developer.mapquest.com/ from the Create Account link.
Paste your key into this field in the system information module.

Locations
Location Mask
This field defines the format of all locations used in the record center, which may contain up to 20 characters.(See the definition of mask criteria[866] in the glossary).

It is very important that the location mask be carefully thought out to accurately reflect the physical storage of the record center before locations have been created or boxes added. Once locations have been created, the mask can no longer be modified.

Floor Length
This field allows to indicate the floor length (or section, zone, etc) in the location mask.
For example, when this field indicates "2" and the field Floor Position indicates "4", "12" represents the floor in the mask "BB-12-8888-8", because they are the two characters starting at the 4th position ("BB-" are considered as 3 characters).

Floor Position
This field allows to specify the position of the floor (or section, zone, etc) in the location mask.
For example, when the current field indicates "4", the floor number starts with "9" in the location mask "AA-9-8888-8", because it is the 4th number in the mask ("AA-" are considered as 3 characters).

Building Length
This field determines the length of the building code in the location mask. This code is always displayed at the beginning of the location.
For example, when the current field is set to "2 the Building field in the Building module has to be composed of two characters. Then in the location "CC-9-3333-3", the building is identified by the first two characters as "CC".

Pick up

Morning picking time
This field allows to indicate a deadline for the morning picking and only applies when the Delivery Cycle field is set to "Twice a day". Beyond this time, all the regular orders placed in the system will be

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delivered the next morning.

Afternoon picking time

This field specifies the cutoff for order entry for the afternoon picking.
It is also the value used if the delivery cycle is "Once a day".

Delivery Cycle

Choice field containing "Once a day" or "Twice a day".
This field allows to specify the daily frequency of deliveries for regular orders.

Same day

This setting applies to "Once a day" delivery cycles. With this option selected, regular orders entered by the afternoon picking time will be deliverable the same day. Otherwise, they will be deliverable the following day.

Note that this can be overridden by the Once a day option[264] in the customer information module.

Delivery/Opened/Start/End

These fields allow to specify the working days of the record center, including business hours. The values entered for these fields are major factors in the calculation of delivery times.

Paging margin before opening time (in hours)

Choice field containing values "0" to "255".
In order to notify employees that an urgent delivery is waiting, this field allows to enter the length of time their pagers will ring before the opening time.

Paging margin after closing time (in hours)

Choice field containing values "0" to "255".
In order to notify employees that an urgent delivery is waiting, this field allows to enter the length of time their pagers will ring after the closing time.

Taxes

Tax Calculation

Choice field containing "Not Taxable", "Tax A Only", "Tax B Only", "Tax A plus Tax B" or "Tax B on Tax A".
The value set for this field determines the default calculation of applicable taxes for billing purposes. This calculation can be modified for each customer and each service of the record center, respectively in the Customer Pricing[743] and General Pricing[734] modules.

GL Codes

In the Invoicing module, you may export your invoices for import into accounting systems including QuickBooks. Entering the correct GL codes in the System Information module as well as in Accounting->General Pricing makes this possible. For details on setting up to export invoices to QuickBooks, please see the following video tutorial: https://www.youtube.com/watch?v=OcNGbkjbkto

- Other accounting systems might require you to configure a report in **Inventory->Report (SQL)** module to produce a spreadsheet that you can import.

GL Code for Tax A

Alphanumeric field that can contain a maximum of 30 characters.
This field allows to specify the GL code for the tax A.

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Note: This code has to match the "chart of accounts" if you use QuickBooks as your accounting software.

GL Code for Tax B
Alphanumeric field that can contain a maximum of 30 characters.
This field allows to specify the GL code for the tax B.

Note: This code has to match the "chart of accounts" if you use QuickBooks as your accounting software.

Tax A Code, Tax B Code
Alphanumeric field that can contain a maximum of 30 characters.
This field was made to accommodate some requirements for exporting invoices to QuickBooks.
In many versions of QuickBooks, entering "AUTOSTAX" in this field will identify this as a tax and permit the software to apply the correct code according to regional settings. This also applies if there is no second tax.

GL Code for Accounts Receivable
Alphanumeric field that can contain a maximum of 30 characters.
This field allows to specify the GL code for the accounts receivable.

Tax A Agency, Tax B Agency
Alphanumeric field that can contain a maximum of 40 characters, used to specify the name of the tax agency for tax A, for exporting to QuickBooks. For example, in Canada, Tax A Agency is 'RECEIVER GENERAL' for GST, and Tax B Agency is 'MINISTER OF FINANCE' for PST

QuickBooks Class
Alphanumeric field that can contain a maximum of 40 characters. This optional field can be useful for identifying the entries as originating from your records management division, if you are managing the accounts of multiple divisions with the same QuickBooks software. The value in System Information can be overridden per customer in the Customer Information module.

Tax A Sales Code, Tax B Sales Code
These fields (added in version 6.25) may be required for newer versions of QuickBooks to ensure that your taxes map correctly to your tax accounts.

Print Invoices from Accounting Software
Choice field containing "Yes" or "No".
When this field is set to "Yes", the system will automatically transfer the invoicing information to the accounting software that will print them.

***Imaging**

Image Directory
Location for internal storage of images. This field can be set using the **Edit->Image directory** 385 function. Please contact DocuData support if you wish to change this.

Documents Directory
Directory for use by the Electronic Document Management level of ActiveWeb, for storing the customers electronic documents. If you have many customers that use this functionality, this folder may occupy a lot of disk space.

Access active docs at RC

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Clients who use ActiveWeb's active file management functionality will have files with in house states that may never be sent to the record center. If this field is set to "No", descriptive information for these records will not be visible through the record center interface and will instead appear as ***, to help protect the confidentiality of these documents.

***Record Center**
These fields allow to enter the name and the main address of the record center.

***SMTP Address**
This field indicates the address of the output mail server. This is used for rush notifications (see Paging options 358 in the Procedures chapter), for emailing images or bills to customers.

Port
Represents the TCP/IP port to access the SMTP server.

SMTP User Name
This field indicates the user name in the output mail server.

SMTP Password
This field indicates the password of the user in the output mail server.

Note : It is essential to set a value for this field, especially when a record center performs imaging on demand or sends bills electronically to customers.

Name, Address, City, Province, Postal code, Country, Telephone, Fax, Internet, Email.
These fields allow to enter the coordinates of the record center.

ActiveWeb URL
This is address of ActiveWeb on the internet. A link to this site is included in e-mail notification that imaging orders have been fulfilled.

Invoice email BCC
Invoices sent by e-mail will also be copied to this address. Record centers typically set up an e-mail address specifically for this purpose, in case sent e-mails need to be reviewed.

Invoice email reply to
When invoices are sent by e-mail, replies will be sent to this e-mail address. This includes delivery failure notices and out of office replies.

Billing Address
These fields allow to enter the billing coordinates of the record center.

Invoice Address Position
These fields permit the positioning of the billing address on print invoices, to align with envelope windows.

Internal Transfer List
Maximum Size
This numeric field indicates the maximum of items that an internal transfer list can contain.

Report Options
Box
These choice fields can contain "Yes" or "No" and allow to specify if the reports of boxes will include the

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boxes in PRE ADD, the boxes' notes, the deleted boxes and the files inside boxes.

File
These choice fields can contain "Yes" or "No" and allow to specify if the reports of files will include the files in PRE ADD, the files' notes and the deleted files.

Alternate bar code lengths
3 to 20
Choice fields that can contain "None", "Box" or "File".
When a record center has decided to use EDC, the original bar codes of all documents (alternate bar codes) are converted in order to be recognized by EDC. The current fields allow to connect different bar code lengths with various items (boxes, files, locations, etc.).
If a field is set to "None", any item whose alternate bar code has the same length will be considered as being a location.
If a field is set to "Box" or "File", any item whose alternate bar code has the same length will be considered as being an inventory item. The system will make the difference between boxes and files according to the operation that it is being performed (box return, file return, etc.).

***
Credit Card Payments
These fields work together. If you wish to enable credit card payment through rcMobile (e.g. for shredding services), select one of the available Gateways and establish an account. Your gateway provider will provide you with the necessary information to fill in these fields.

Note that for PCI compliance, rcMobile does not collect or process any credit card information. Instead, it provides the necessary charge information to the gateway, which processes the information. When the processing is done, the gateway passes confirmation back to rcMobile.

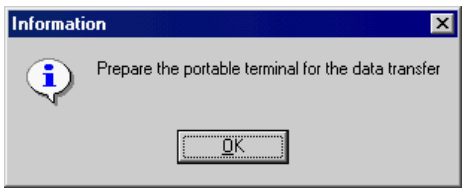
Shredding
Enter your hours of operation for your shredding operations here. This will be reflected in your on site shredding calendar, which is used for scheduling shredding orders.

9.3.10.3 Configuring the PDT for various operations

This option allows to update the PDT configuration before performing any operation with the device.

Normally, only the record center supervisor has access to the System Information module and is able to modify the system information (module's fields). In fact, some of these modifications can have an impact on the interpretation of data scanned with the PDT. This is the case for the Alternate bar code lengths[365] field. That is why the supervisor should think to reconfigure the PDTs anytime a system information is modified.

1 Click on **Management**->**System Information** from the Main window.
2 Click on **File**->**Configure PDT**. A dialog box appears.



3 As recommended, prepare the PDT to receive the data and press **OK**. As soon as the transfer is

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complete, the PDT is ready to process any operation (picking, returns, refiling, etc).

9.3.10.4 Purging the error log

Purging the error log is a maintenance operation that can be performed every two or three months (or more), to reduce the amount of information to sort through when an error must be consulted for problem solving. Usually the error log is used by IT personnel to make sure everything is working properly, thus the purge enables them to easily track recurring problems.

1. Click on **Management->System Information** from the Main Window.
2. Click on **File->Purge Error Log** . A window appears.
3. Enter a date range for which you want the purge to be performed and press **OK**. All the data contained in the error log within this date range will be deleted from the file. The changes will be noticeable if the error log is consulted (**Main window ->Help ->View Error Log**).

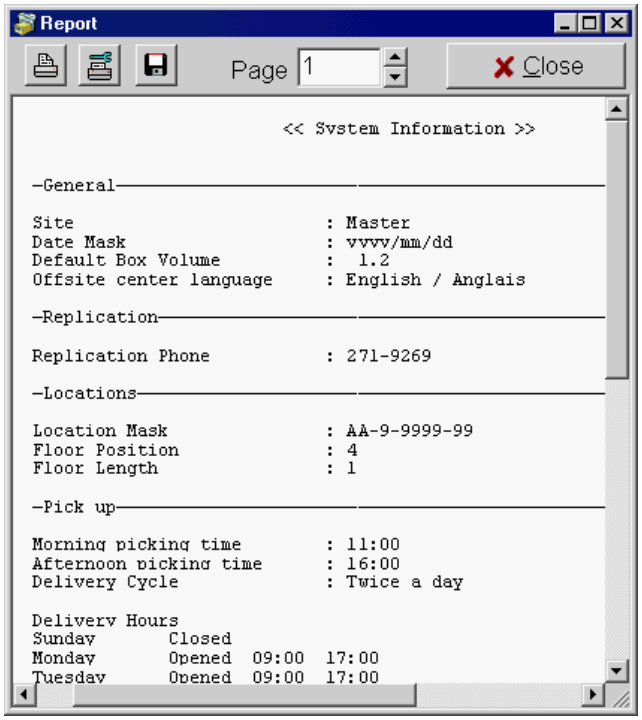
9.3.10.5 Editing system information

Consult the description of the fields in the previous section in order to know which parameters can be configured in this module.

1. Click on **Management->System Information** from the Main window.
2. Click on **Edit->Edit**.
3. Enter the desired information in the appropriate fields[365] .
4. Click on the **Accept** button when finished.

9.3.10.6 Viewing or printing system information

1 Click on **Management**->**System Information** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. The report is automatically displayed or printed as follows.



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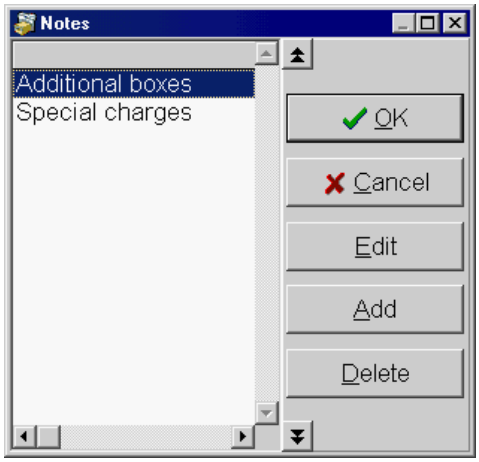
9.3.10.7 Adding, editing or deleting the notes for deliveries

In order to be consistent and to save time, some notes can be predefined and can be added easily on deliveries. These notes will also be used to justify additional or canceled charges on deliveries.

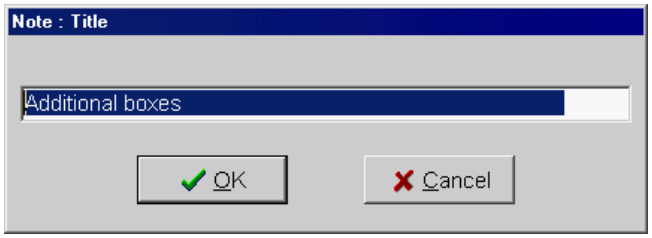
1 Click on **Management**->**System Information** from the Main window.
2 Click on **Edit**->**Delivery Notes**. A window opens.



3 Perform one of the following operations :

- To remove a note, select it and click on the **Delete** button. A dialog box appears and asks to confirm the operation. Click on the **Yes** button to proceed to the deletion.

- To modify a note, select it and click on the **Edit** button. A window appears.



Enter a new title for this note and press **OK**. A new window is displayed on the screen.

Select one language to specify which version of the note has to be modified and press **OK**. A new window appears.

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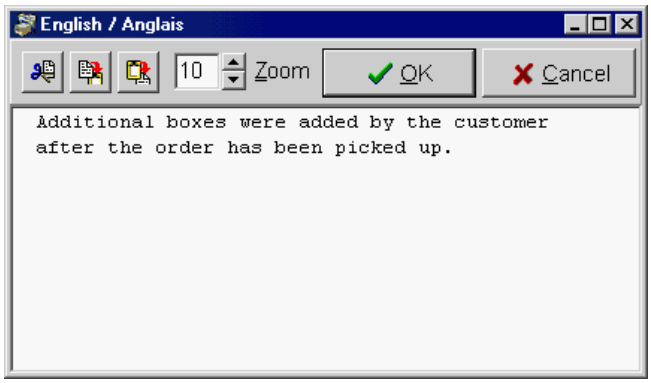
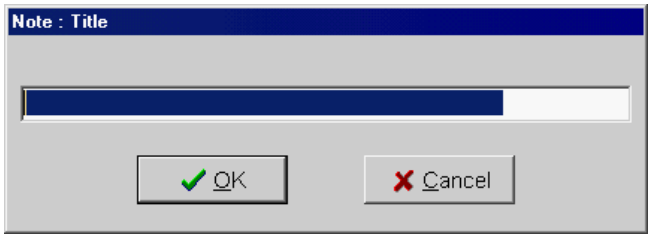


Enter the desired changes in the text and press **OK**.

- To create a new note, click on the **Add** button. A window appears.



Enter a title for the note and press **OK**. A text window opens and allows to enter the note in English. Proceed and press **OK**. Another text window, similar to the previous one, appears and allows to enter the note in French. Proceed and press **OK.**

9.3.10.8 Creating the exclusion list for deliveries

Regular orders of documents are generally picked up on a half-day or daily basis, according to the parameters set in the Customer Information and System Information modules. When regular deliveries are created at a set time, the system compiles all the regular orders for all the customers. For practical reasons, a customer can be excluded from the list of regular deliveries and its own deliveries can be created manually at a specific time.

1 Click on **Management**->**System Information** from the Main window.
2 Click on **Edit**->**Delivery Exclusion List**. A window opens on the screen.

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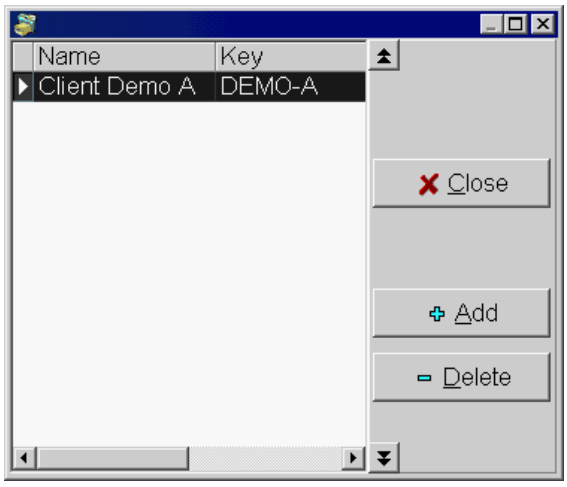
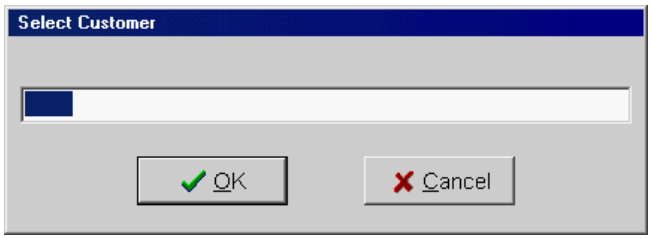


Note : This window contains the list of the customers which are excluded from regular deliveries. This list is empty when no customer has been defined as such.

3 Perform one of the following operations :

- To add a customer to the exclusion list click on the **Add** button. A window appears.



Enter the code of the customer to be added and press **OK**.

- To remove a customer from the exclusion list, select it and click on the **Delete** button. A dialog box appears and asks to confirm the operation. Click on the **Yes** button and the customer will not appear anymore in the exclusion list.

4 Click on the **Close** button when finished.

9.3.10.9 Adding a Global invoice note

Global invoice notes will appear at the bottom of all invoices for which the option to display this note is not deselected in the Invoicing[699] module. It is also possible to add notes for a specific customer, and to a specific invoice[296] .

To add a Global invoice note:

1. Open the **Management->System Information** module.
2. From the menu, select **Edit->Global invoice note**.
3. In the box that appears, enter your note, then click **OK**.

These notes will be displayed at the end of the invoice.

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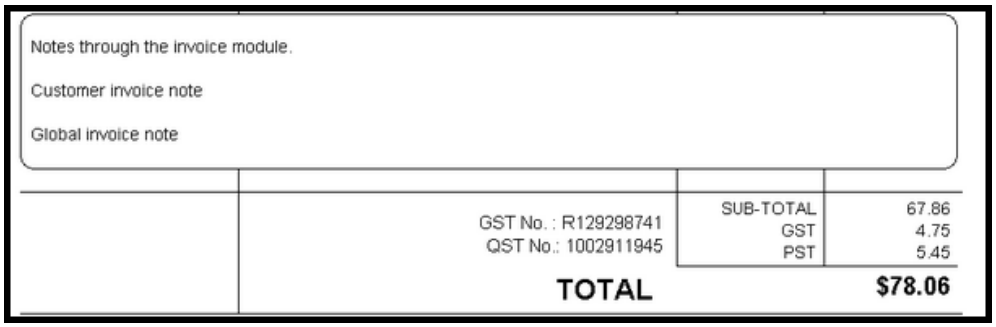

9.3.10.10 Edit Default invoice template

For a given customer, if the Legacy Invoice[254] setting is set to **No** in the Customer->Customer Information module, the system will format the customer's invoice using a customizable report rather than using the standard invoice layout.

This layout can be defined for the specific invoice[710]. If it is not defined here, the system will check for the default invoice template defined at the customer level[297], then finally at the record center level[380].

To edit the default invoice template:

1. Open the **Management->System Information** module
2. From the menu, select **Edit->Default invoice template**
3. A dialogue prompts, "Use this invoice for the template".
- If you have an invoice that you would like to start with, enter its number and click **Okay**.
- Otherwise, click **Cancel**.
4. The invoice layout appears. Modify the invoice layout[710] as desired.
5. Close the invoice layout window when done. If you have made changes, the system will prompts, "Save Changes?"
6. Click "**Yes**" to save changes.

The changes will be apparent on any invoice for which the default invoice applies.

9.3.10.11 Modifying the delivery totals report template

You can edit the delivery totals report template using the standard report builder design tab tools as described in Working with the Design tab[505] and the product tutorial, available at http://www.docudatasoft.com/supportfiles/tools/report_builder_tutorial.zip.

The most common modifications that you will make are adding or removing fields from the layout and updating what levels the report details are summarized to.

1. Open the **Management->System Information** module
2. From the menu, select **Edit->Delivery totals report template**
3. Modify the delivery totals report template as desired.
4. Close the window when done. If you have made changes, the system will prompts, "Save Changes?"
5. Click "**Yes**" to save changes.

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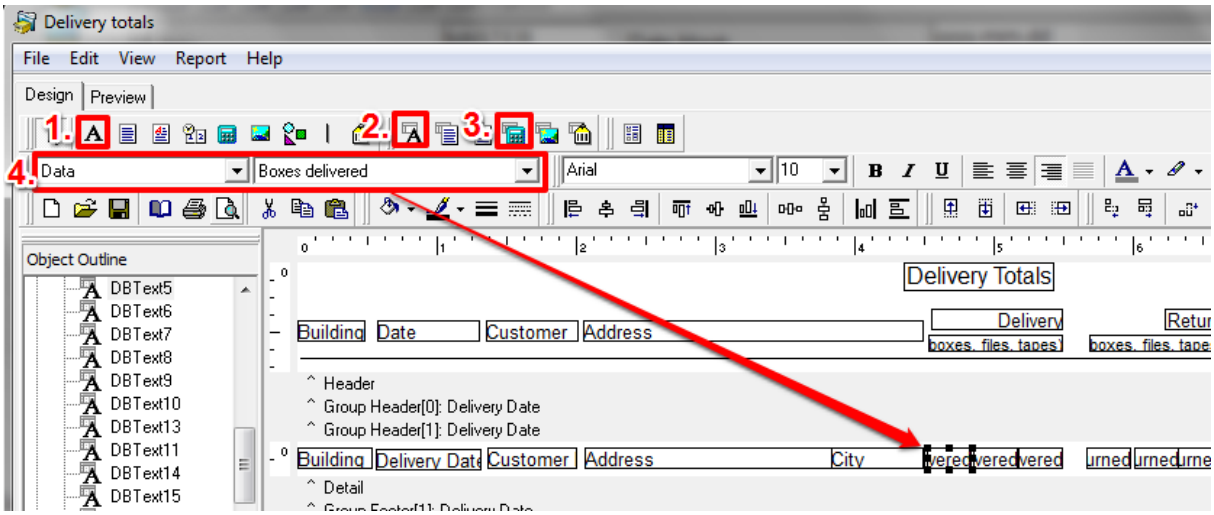

Common modifications:

1. To add a test label to the report, click on the "A" button, click on the layout to place it, then in the text entry box that appears in place of box 4 above, type the value for the label.
2. To add a field from the database, click the button indicated by #2 above, place it on the layout, and use the drop-down list indicated by box #4 above to select from the available data fields.
3. To add a total, click the calculator button (#3 above. Click to place it on the layout, right-click to modify the "calculation" from the right-click menu, and select the field to calculate on in #4 above.
4. Box #4 permits you to select the data source for data fields or type the value for text label. If this does not appear, from the menu select View->Toolbars->Edit.

To remove a field, select it and delete it

For more details, please feel free to explore the report builder interface or consult the help topic, Working with the Design tab[505], or the product tutorial, available at http://www.docudatasoft.com/supportfiles/tools/report_builder_tutorial.zip.

9.3.10.12 Editing the client software trial offer email

EDC ActiveFile permits customers with sophisticated internal records management needs to integrate this management with the management of records at your record center. Selling your customers this software can provide you with an additional source of revenue.

In the Customer->Customer Information module, there is an option to e-mail customers a trial software offer[274].

To modify the content of this e-mail:

1. Open the **Management->System Information** module.
2. From the menu, select **Edit->Client software trial email**.
3. Select the language of the message to edit, and click **OK**. (You will probably need to edit both, if you record center is bilingual). A window appears

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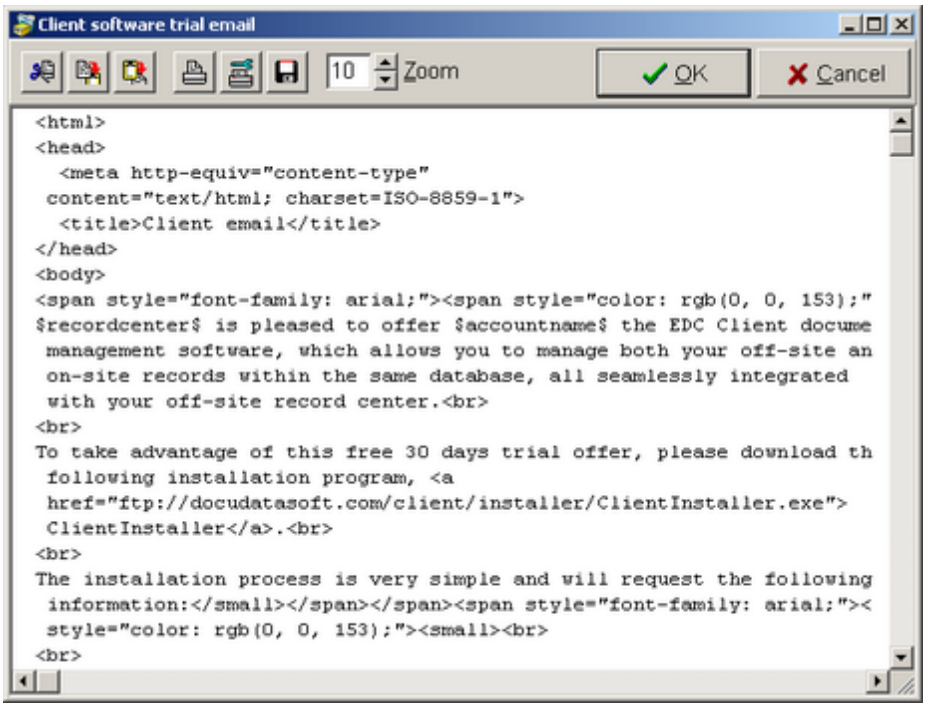
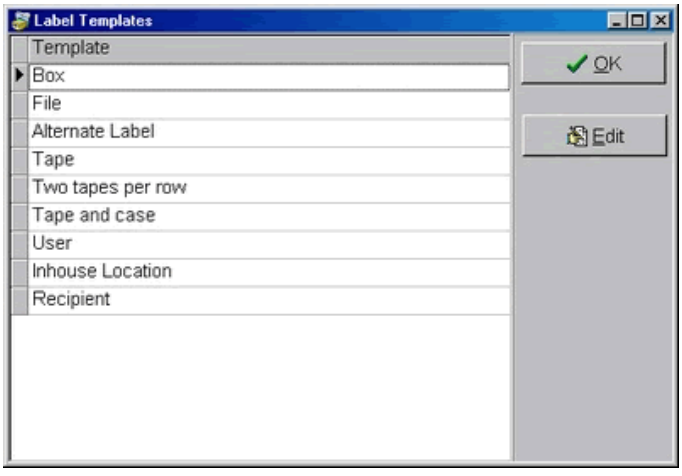


4. Edit the text directly in the window, or copy it into an HTML editor, make changes, then paste it back in.
5. Click **OK** when finished.

9.3.10.13 Editing Label Templates

These label templates are the ones used by EDC when printing thermal labels on thermal printers that use Windows printer drivers. This allows you to customize every thermal label template used by the system.

1 Click on **Management**->**System Information** from the Main window.
2 Click on **Edit**->**Label Templates**. A window appears.



3 Select the template and double click on it or press **Edit**. The template will appear in a window similar to the SQL Report module. Here is an example :

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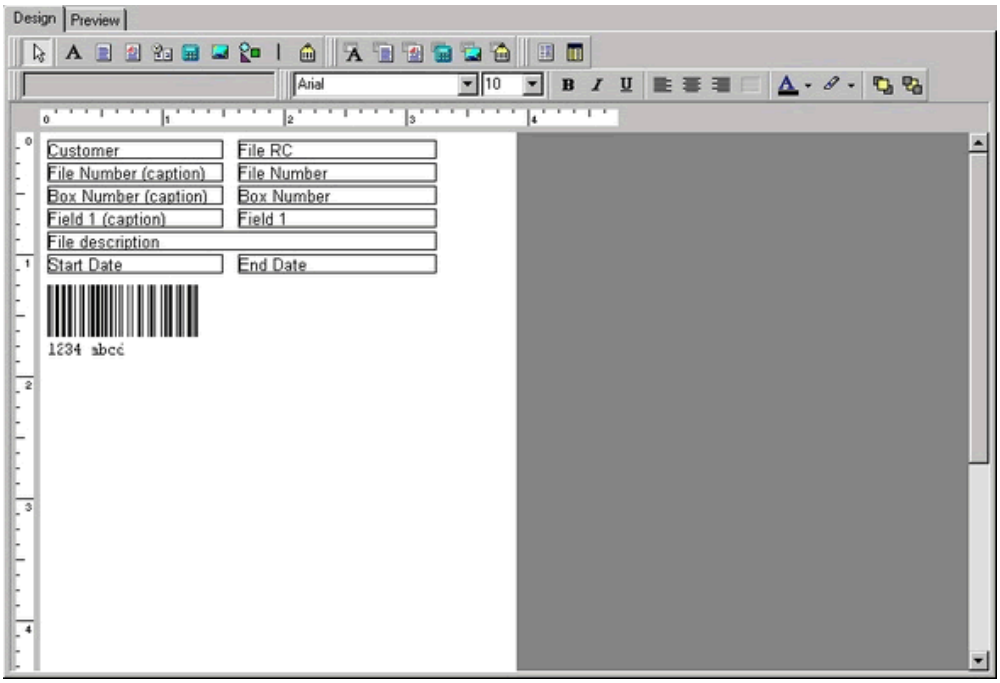

The information can be deleted, modified (size or text format) or moved. For more detailed information concerning the modification of label templates, see the Working with the design tab[505] topic.

4 When all the changes have been performed, close the window. The system will prompt you to save the changes. To save the changes press Yes, to cancel your modifications press No and to make more modifications press Cancel.

5 If you have no more templates to edit press **OK**. If you want to modify other templates, repeat steps **1** to **4**.

9.3.10.14 Document separator pages

To facilitate the scanning and importation of many documents, you may print imaging separator pages[466]. Place these at the beginning of each file on the scanner's automatic document feeder, and then process these using a third-party software called DocuScan Pro for efficient import to EDC RC.

Similarly, if documents frequently require the same image index headings, you may print Document Separator Pages to insert at the beginning of each section. When EDC brings in these images, it will recognize the pages and automatically create the image index.

1. In the **Management->System Information** module, select **Edit->Document separator pages**. A window appears.

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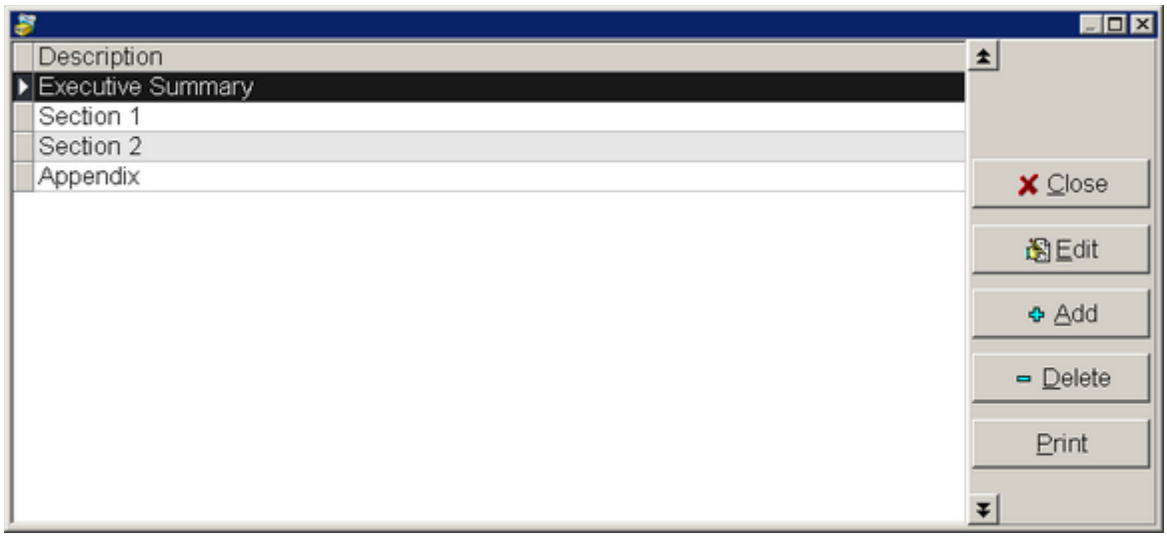
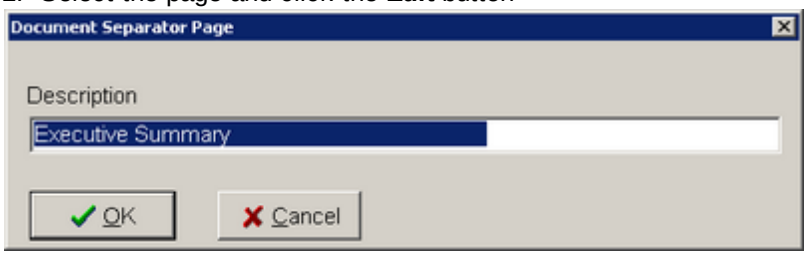


To edit an existing page

2. Select the page and click the **Edit** button



3. Change the description and click **Okay** or press **Enter**.

To add a new page

4. Click the **Add** button
5. Enter a description and click **Okay** or press **Enter**.

To delete an existing page

6. Select the page and click the **Delete** button
7. Click the **Yes** button to confirm the deletion

To print an existing page

8. Select the page and click the **Print** button
9. An image separator page will print on the laser printer

(This page has numbers for identification and the words "Document Separator Page - " followed by the description, repeated several times, to clearly identify it as an image separator page and not part of the original document. The scanned image of this page is removed and automatically replaced by an index entry upon importation to the database.)

9.3.10.15 View and unlock locked operations

This operation allows to view and to unlock locked tasks. When a task is locked, the module cannot be used by the employees.

1 Click on **Management**->**System Information** from the Main window.
2 Click on **Edit**->**Unlock operations**. A window opens on the screen.

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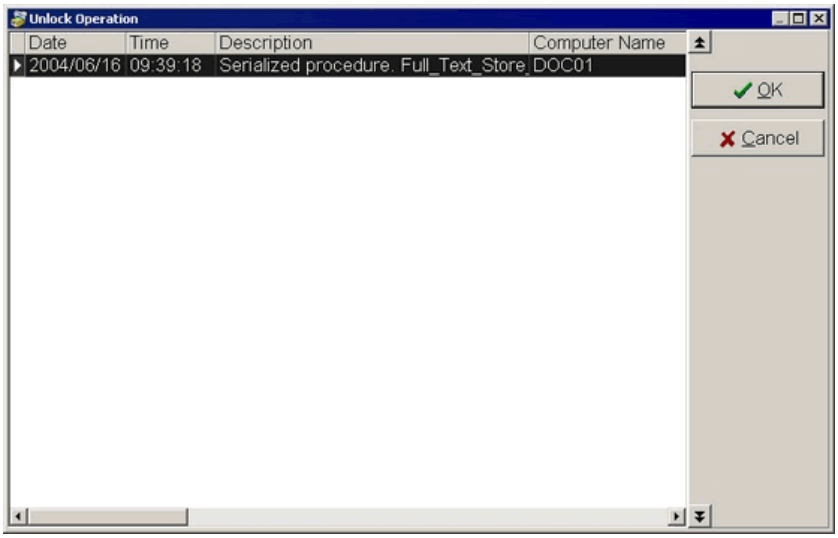


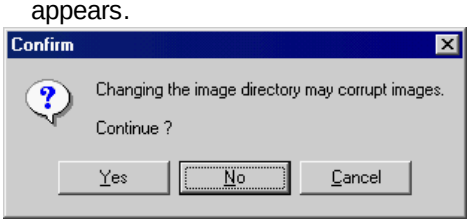
3 To unlock an operation: select the wanted operation (it will appear highlighted) and press **OK**.

Note: The operation called 'Serialized procedure: Full_Text_Search_Store_Index' should not be unlocked since this automatic procedure is responsible for the indexation of the keywords for boxes and files. It will restart automatically next time you log into EDC if you unlock it.

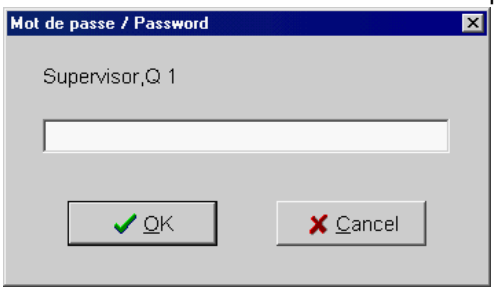
9.3.10.16 Changing the image directory or document directory

Customers may store electronic documents and scanned images at your record center and these may occupy significant disk space. The current operation allows you to define or change this directory.

1. Open the **Management->System Information** module.
2. From the menu, select **Edit->Image Directory**, or **Edit->Documents Directory**. A dialog box appears.



3. Click on the **Yes** button to confirm the operation. A window prompts for a password.



4. Enter the password and press **OK**. A window prompts for the new directory.

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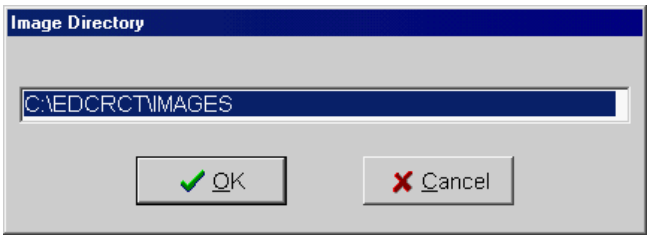


5. Enter the new image or document directory and press **OK**.

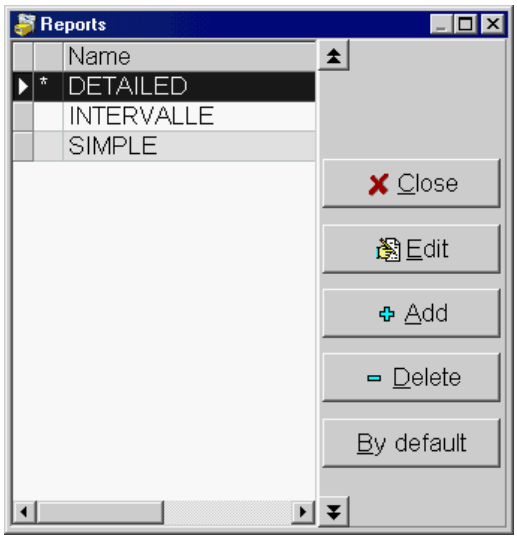
9.3.10.17 Editing the reports of boxes or files and setting the default report

Editing the reports of boxes and files

This operation allows to edit the reports used everywhere in the system and produced for the whole inventory. Essentially, it is necessary to define which fields of the Box and File modules will appear on these reports and to specify their display order.

Note : The reports set here for customers (**Report**->**Customer**->**...**) are the ones granted to a customer when he is created in the Customer Information[299] module.

1 Click on **Management**->**System Information** from the Main window.
2 Click on **Report**->**Record Center**|**Customer**->**Box Report Fields**|**File Report Fields**. A window appears.



Note : This window is empty when creating the first report but in this example, it contains reports already defined.

3 Perform one of the following operations :

- To add a report, click on the **Add** button. A window appears.

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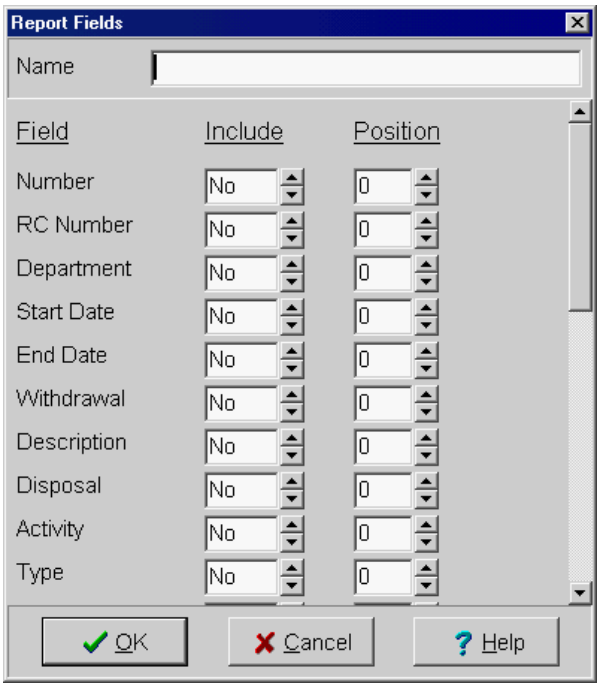

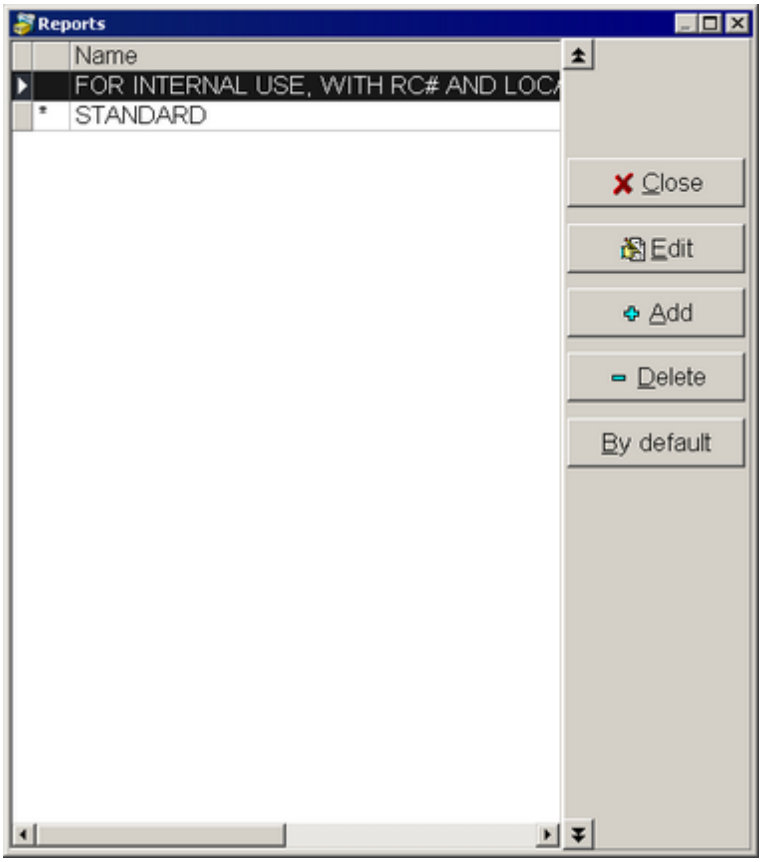

Note : This window indicates the fields available in the Box and File modules.

Enter the name that will identify the report everywhere in the system. Click on the choice button of the Include column only for fields to be displayed on the report and set it to "Yes". Click also on the

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choice button of these fields in the Position column and set their display order. Press **OK** when finished.

- To delete a report, select it in the list and click on the **Delete** button. Click on the **Yes** button of the dialog box that is displayed to confirm the deletion.

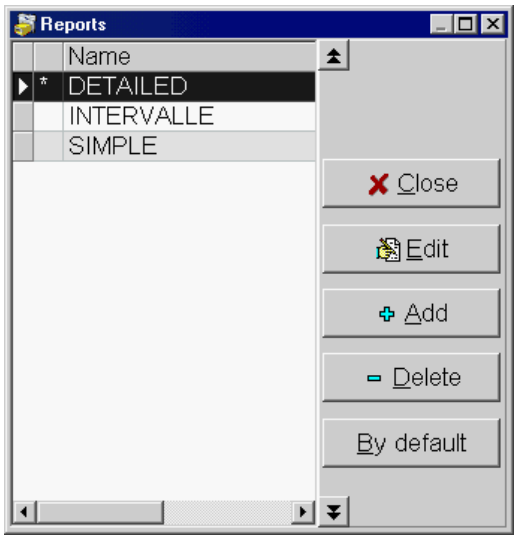
- To modify a report, select it in the list and click on the **Edit** button. The same modifications as when adding a report can be done. Then it is possible to edit the name of the report, its fields and their display order.

4 Click on the **Close** button when finished.

Set the default report

One of these reports can be defined as the one used by default everywhere in the system, unless a specific report is chosen before production and the report options are set in the related module.

1 Click on **Management**->**System Information** from the Main window.
2 Click on **Report**->**Record Center**|**Customer**->**Box Report Fields**|**File Report Fields**. A window appears.



3 Select the desired report (it will appear highlighted) and click on the **By default** button. A small mark will appear in front of the report in question.
4 Click on the **Close** button when finished.

9.3.11 Customer Export

9.3.11.1 Overview (Customer Export)

This module is used to copy and export data belonging to a customer, typically when implementing EDC ActiveFile at the customer's site. It is possible to protect this data with a replication key.

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Available reports

- None.

Fields

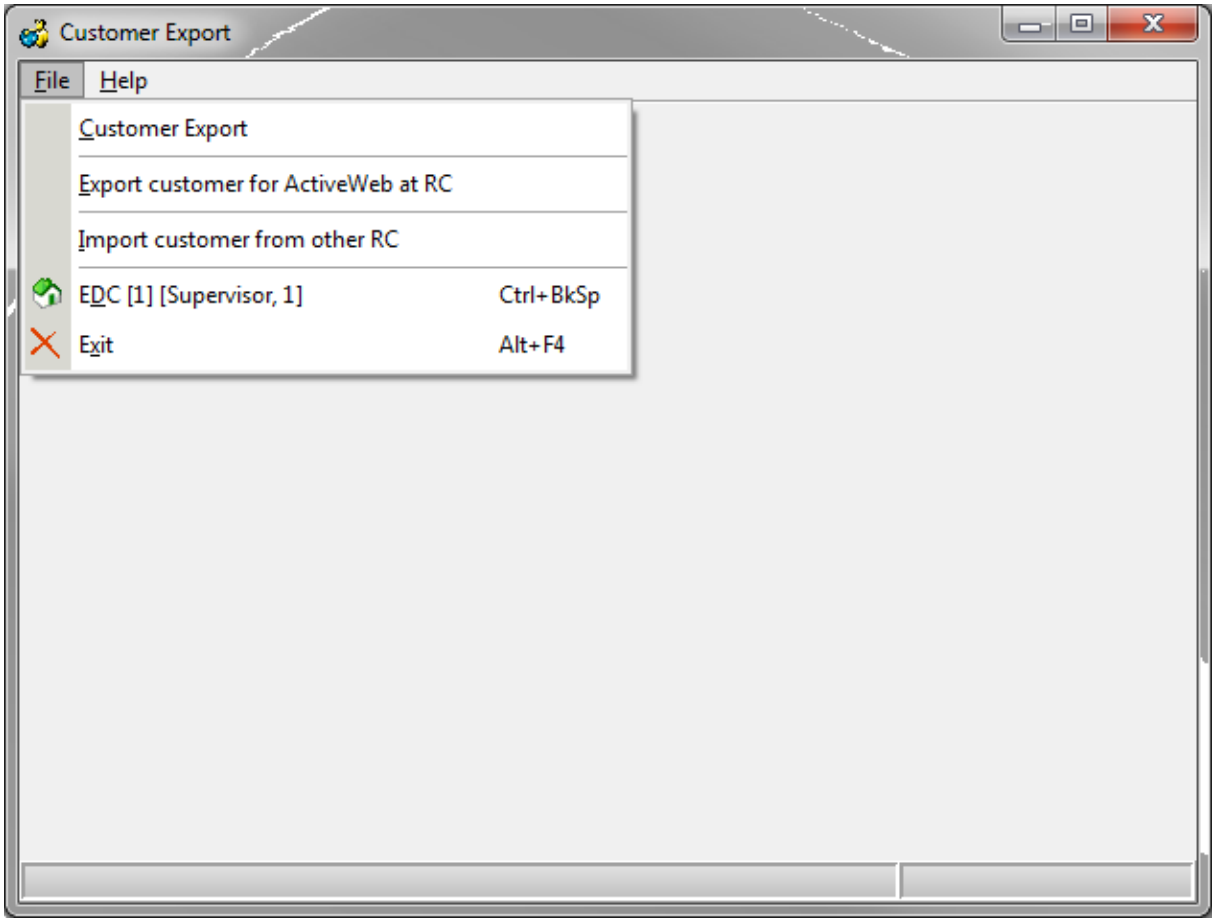
- None.

Distinctive menu options:

File menu

- Customer Export 389
- Export customer for ActiveWeb at RC 390
- Import customer from other RC 390

Module window:



9.3.11.2 Exporting all the data of a customer

1 Click on **Management**->**Customer Export** from the Main window.
2 Click on **File**->**Customer Export**. A window opens and asks for a customer code.
3 Enter the code of the desired customer and press **OK**. A new window appears.

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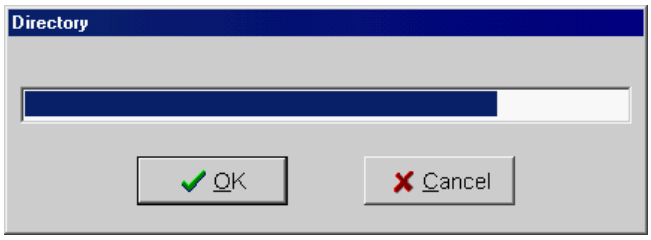

4 Enter the directory where the data will be temporarily exported to and press **OK**. A message appears.

5 Press **OK** when finished. The data will be exported to the specified folder. This can then be used in setting up the customer with ActiveFile. This is typically done with the assistance of support@docudatasoft.com.

9.3.11.3 Export or import accounts for ActiveWeb between record centers

With the introduction of My Active Records, DocuData envisioned end users signing up for electronic and in house records management services online, and then transferring to local record centers once they realized that they would also benefit from physical records management and shredding services. To support this, DocuData added functionality to export a client from My Active Records and import all of the necessary data at a local record center. Note that the two record centers should both ideally be using the latest official release.

Exporting an account:

1. Open the **Management->Customer Export** module.
2. From the menu, select **File->Export customer for ActiveWeb at RC**.
3. Select the account to export.
4. Provide the folder to export the data to (e.g. by creating a folder in windows explorer and pasting in the path)
5. After you click okay, EDCRC will produce a file with a name such as Export_CustNo_38944.db, where the last number is the system number of the account.

Importing an account:

1. Open the **Management->Customer Export** module.
2. From the menu, select **File->Import Customer from other RC**.
3. EDC prompts, "Import customer from other RC? This operation cannot be undone." Click **Yes**.
4. Select the .db file to import.
5. Enter your password to confirm.

If your table structures are compatible, the account will be imported. If you receive error messages then you may need to update to a more recent version of EDCRC to be compatible with the account being imported. Please read the error message carefully to see if you can make sense of it and resolve the problem. If not, please send a screen-shot of the error message to support@docudatasoft.com and we will help you to troubleshoot.

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9.3.12 Customer Purge

9.3.12.1 Overview (Customer Purge)

This module is used to permanently remove all the data of a customer from the main database.

The purge of a customer is rarely done. Nevertheless, a customer whose contract with the record center is ending can ask for the retrieval of all its data.

Note: A customer cannot be purged from the system if any of his documents are not in a terminal phase, "DESTROYED", "DELETED", or "TRANSFERRED". Even PRE ADD documents must be removed[413].

Available reports

- None. (See the Report[501] module)

Fields

- None.

Tasks

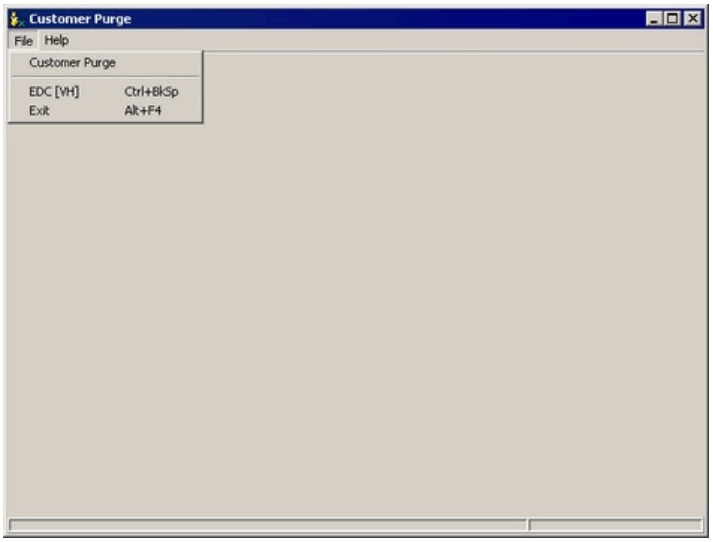
- Purging all the data of a customer from the system[392]

Distinctive menu options:

File menu

- Customer purge

Module window:



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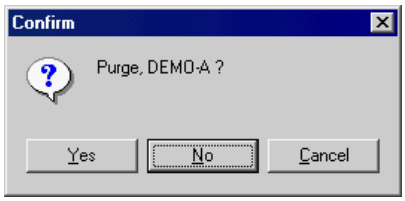
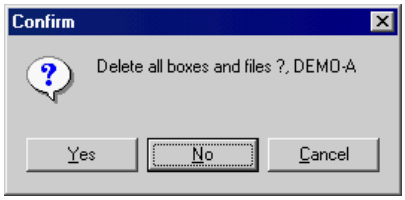
9.3.12.2 Purging all the data of a customer from the system

Purging a customer's data will remove data about inventory from the system, such as box and file listings, departments, and documents types. The delivery numbers and order numbers will be kept, but reference to specific boxes or files are removed. Prior to purging, all items belonging to the customer must be in "DESTROYED", "DELETED", or "TRANSFERRED" states. The purge process marks the account as inactive.

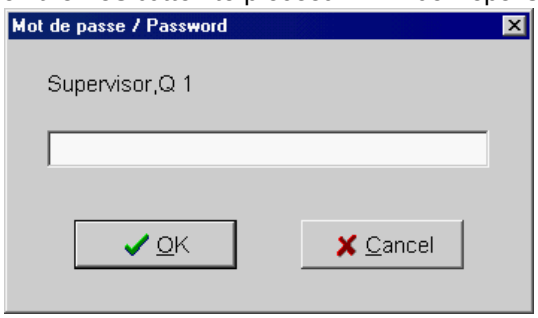
1. Open the **Management->Customer Purge** module.
2. From the menu, select **File->Customer Purge**. You will be prompted for a customer.
3. Enter the customer key of the desired customer, and press **OK**. A dialog box confirms the account you selected.



4. Click on the **Yes** button to confirm the purge. A second dialogue box confirms that you understand what will happen.



5. Click on the **Yes** button to proceed. A window opens for authorization.



6. Enter the password and click **OK**. The system automatically will verify that all items are in terminal states, and if so, the data will be permanently purged from the system. A message confirms that the purge was successful.

9.4 Maintenance (Maintenance tab)

9.4.1 Outline (Maintenance)

EDC RC promotes adherence to standard operating procedures to ensure the integrity and smooth functioning of your record center. However, on occasion you may need the flexibility to bypass some of these processes in maintaining your data. Many of these functions are isolated in modules on the

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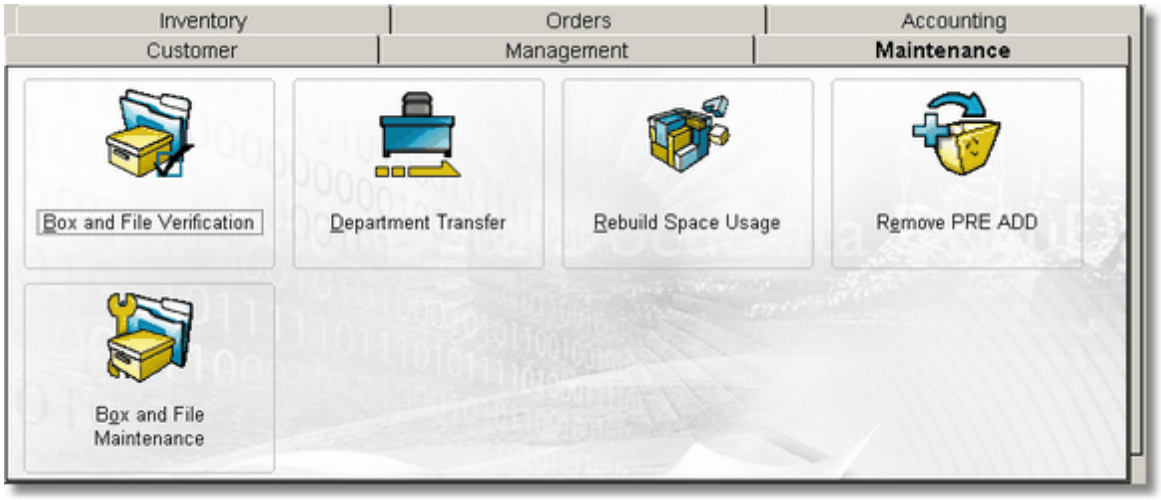
Maintenance tab, so that you can restrict access prevent accidental use.



Modules

- Box and File Verification 393
- Department Transfer 397
- Rebuild Space Usage 401
- Remove PRE ADD 410
- Box and File Maintenance 414

9.4.2 Box and File Verification

9.4.2.1 Overview (Box and File Verification)

This module verifies the integrity of box and file information. It can be useful for correcting errors that may be introduced by exceptions such as computer or network failures.

Available reports

- (see file menu options)

Fields (none)

Tasks

- (see file menu options)

Distinctive menu options:

File menu

- Verify boxes 394
- Verify files 395
- Verify locations 396

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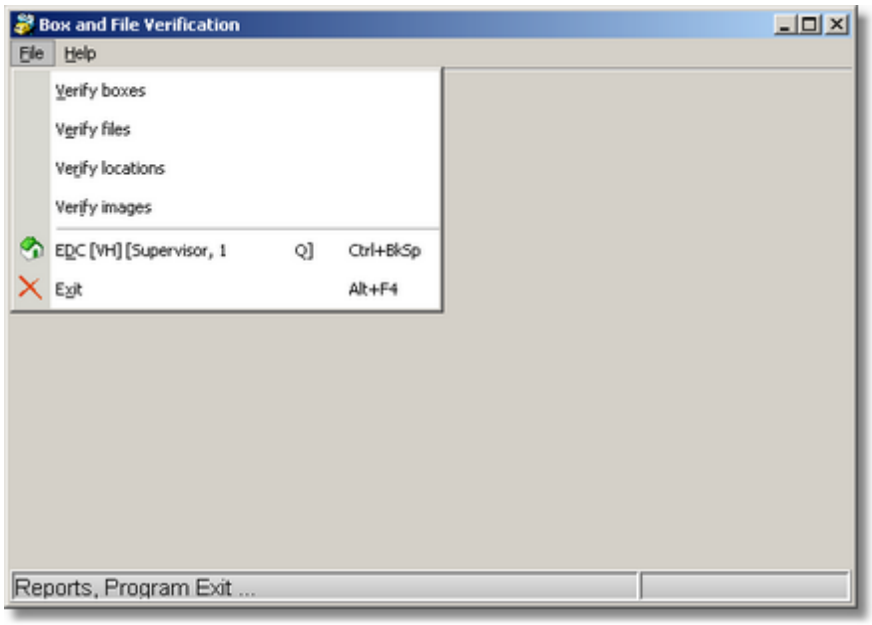
- Verify Images 397

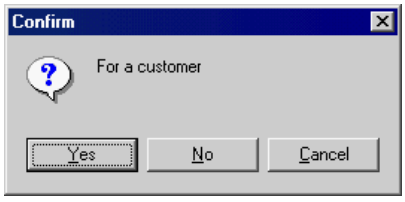
Module window:



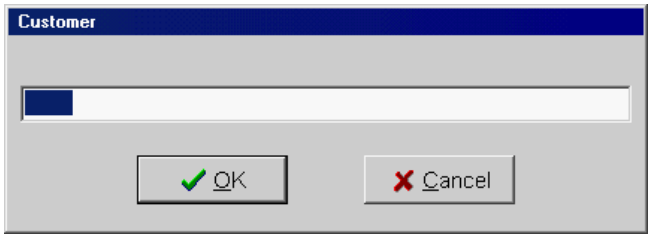
9.4.2.2 Verifying the integrity of boxes

The following verifications were put in place to verify the integrity of the database and of the different items. This should usually be done after importing items in the system via the import function of the Box and File Maintenance module. It can also be done if a lot of data entry has been done in the system.

1 Click on **Maintenance**->**Box and File Verification** from the Main window.
2 Click on **File**->**Verify boxes**. A dialog box appears and asks if the report must be printed.
3 Click on the **Yes** button, if you want to print the report. A new dialog box opens.



4 Click on the **No** button to produce an overall report or click on the **Yes** button to produce a report for a specific customer. When clicking on **Yes** a window appears.



5 Enter the code of the desired customer and press **OK**. A window appears.

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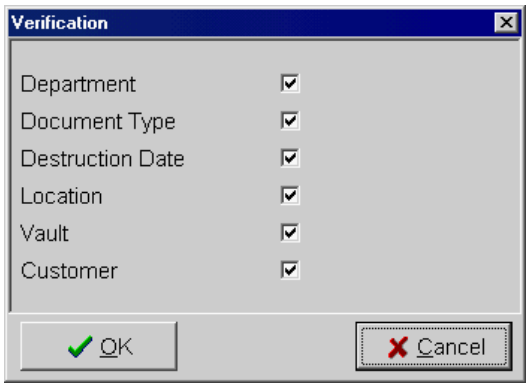
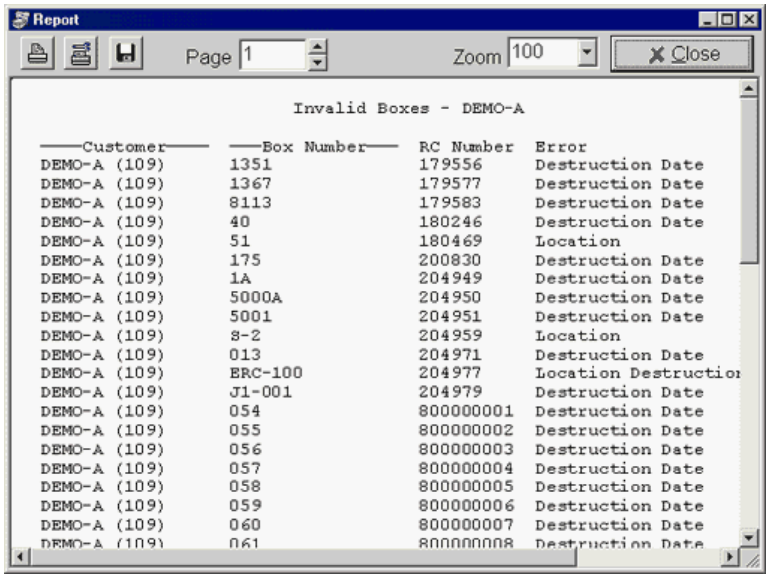


Department - This checks if the box has a valid department and sub department.
Document Type - This checks if the box has a valid document type, it does not check the restrictions that apply to each Document type.
Destruction Date - If the disposal of the item is not locked (FIXED), it checks that the destruction date is properly calculated from the document type.
Location - This checks that the box is assigned to a valid Location (if the box is in the IN or the SELECTED state).
Vault - This checks if the box in vault box setting corresponds to the in vault settings of the location it is assigned to (i.e. if the box has the Vault option checked, the location it is assigned to should have the Vault setting set to YES)
Customer - This checks if the box is assigned to a customer.

6 When needed, uncheck some options to prevent their display on the report and press **OK**. The system automatically prints or displays the report.


Report
Page 1
Zoom 100
Close
Invalid Boxes - DEMO-A
Customer | Box Number | RC Number | Error
DEMO-A (109) 1351 179556 Destruction Date
DEMO-A (109) 1367 179577 Destruction Date
DEMO-A (109) 8113 179583 Destruction Date
DEMO-A (109) 40 180246 Destruction Date
DEMO-A (109) 51 180469 Location
DEMO-A (109) 175 200830 Destruction Date
DEMO-A (109) 1A 204949 Destruction Date
DEMO-A (109) 5000A 204950 Destruction Date
DEMO-A (109) 5001 204951 Destruction Date
DEMO-A (109) S-2 204959 Location
DEMO-A (109) 013 204971 Destruction Date
DEMO-A (109) ERC-100 204977 Location Destructio
DEMO-A (109) J1-001 204979 Destruction Date
DEMO-A (109) 054 800000001 Destruction Date
DEMO-A (109) 055 800000002 Destruction Date
DEMO-A (109) 056 800000003 Destruction Date
DEMO-A (109) 057 800000004 Destruction Date
DEMO-A (109) 058 800000005 Destruction Date
DEMO-A (109) 059 800000006 Destruction Date
DEMO-A (109) 060 800000007 Destruction Date
DEMO-A (109) 061 800000008 Destruction Date

7 Click on the **Close** button to end the viewing.

9.4.2.3 Verifying the integrity of files

The following verifications were put in place to verify the integrity of the database and of the different items. This should usually be done after importing items in the system via the import function of the Box

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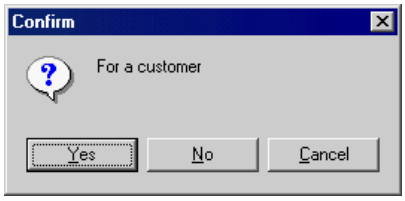
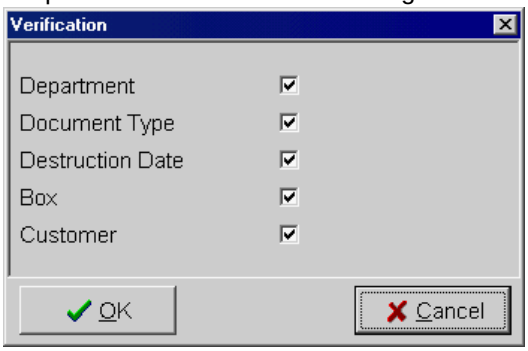
and File Maintenance module. It can also be done if a lot of data entry has been done in the system.

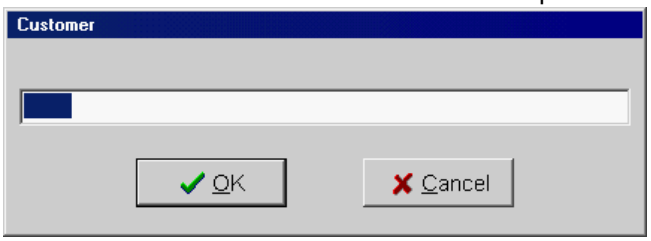
1. Click on **Maintenance->Box and File Verification** from the Main window.
2. Click on **File->Verify files**. A dialog box appears and asks if the report must be printed.
3. Click on the **Yes** button if you want to print the report. A new dialog box opens.



4. Click on the **No** button to produce an overall report or click on the **Yes** button to produce a report for a specific customer. When clicking on Yes a window appears.



5. Enter the code of the desired customer and press **OK**. A window appears.



Department - This checks if the file has a valid department and sub department.
Document Type - This checks if the file has a valid document type, it does not check the restrictions that apply to each Document type.
Destruction Date - If the disposal of the item is not locked (FIXED), it checks that the destruction date is properly calculated from the document type.
Box - This checks if the file is assigned to an existing box.
Customer - This checks if the file is assigned to a customer.

6. If so desired, uncheck some options to prevent their display on the report and press **OK**. The system automatically prints or displays the report.

9.4.2.4 Verifying the integrity of locations

This operations verifies if the amount of boxes IN the location corresponds to the value contained in the field Used of the Location module.

1. Click on **Maintenance->Box and File Verification** from the Main window.
2. Click on **File->Verify locations**. A dialog box appears and asks if the report must be printed.

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3. Click on the **Yes** button if so desired. The system automatically proceeds to the verification of locations and the report is printed or displayed soon after.

9.4.2.5 Verifying the integrity of images

This operations verifies the integrity of data related to images, their indexes, and the files that contain them.

1. From the **Maintenance->Box and File Verification** module, select **File->Verify images**.
2. A confirmation warns that this operation may be very long. (you may want to run it from the server, at a timer when the system is not busy.) Click **Yes** button.
3. Once the images have been verified, a message indicates 'Validation complete'. If there are any errors requiring attention, a message will appear.

9.4.3 Department Transfer

9.4.3.1 Overview (Department Transfer)

This module allows the transfer of documents between departments and sub-departments for one customer. These operations will modify the information of documents. The changes are viewable in the Box, File and Department modules. To activate the module, it is necessary to select a customer from the file menu.

Available reports

- None (See the Report[501] module)

Fields (None)

Tasks

- Transferring a sub-department to another department[398]
- Transferring a sub-department to another sub-department[399]

Distinctive menu options:

File menu

- Select customer (Select which customer's sub-departments to transfer)

Department menu

- Sub to Main Department[398]
- Sub to Sub-Department[399]

Module window:

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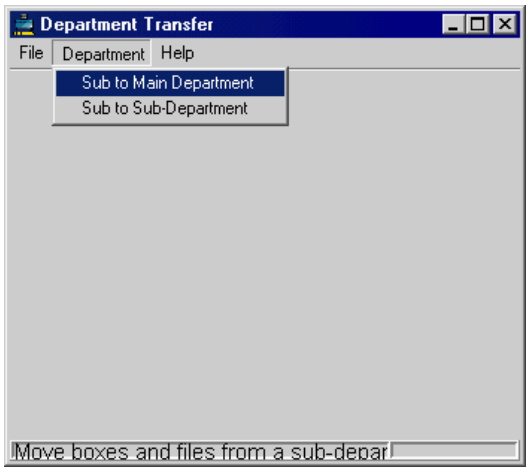
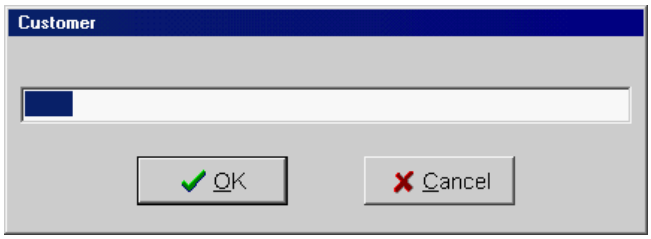


9.4.3.2 Transferring a sub-department to another department

Normally, each department has many sub-departments. In this operation, a sub-department of a department can be reassigned to another department. All the documents of this sub-department still belong to it, but they are moved to another department.

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1 Click on **Maintenance**->**Department Box/File** from the Main window.
2 Click on **File**->**Select Customer**. A window appears.



3 Enter the code of the desired customer and press **OK**.
4 Click on **Department**->**Sub to Main Department**. A window opens.

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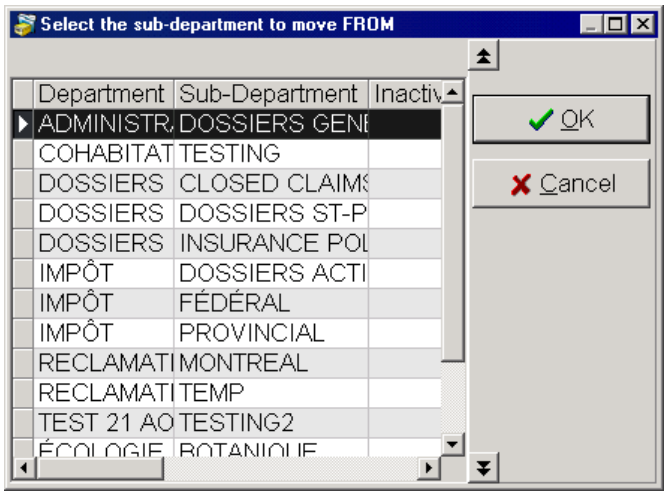
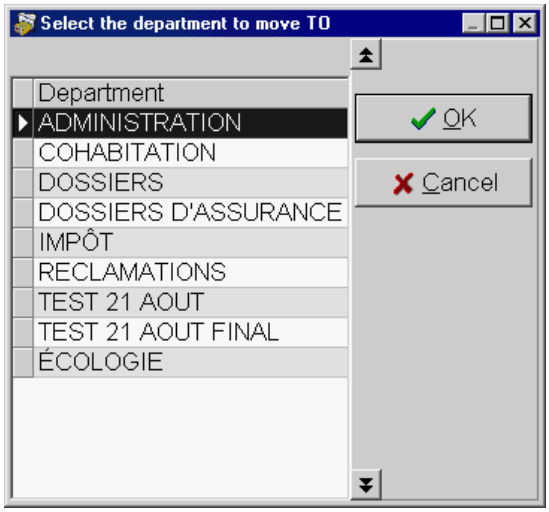


5 Select the sub-department to be transferred (it will appear highlighted) and press **OK**. A window is displayed on the screen.



6 Select the target department (it will appear highlighted) and press **OK**. The system proceeds to the update of the information.

Note : If the sub-department is already in the right main department an error message will appear.

9.4.3.3 Transferring a sub-department to another sub-department

This operation allows the transfer of all the documents from a sub-department to another sub-department. The sub-department transferred is not deleted from the system but is emptied. All its documents are now included in another sub-department and new documents could be added to this sub-department later on.

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1 Click on **Maintenance**->**Department Transfer** from the Main window.
2 Click on **File**->**Select Customer**. A window appears.

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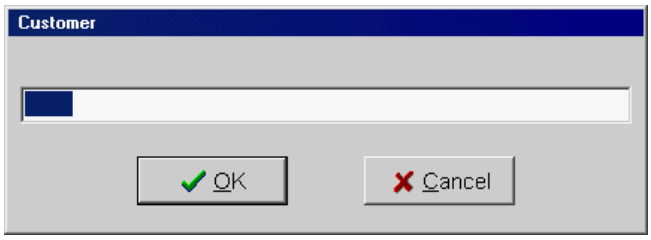
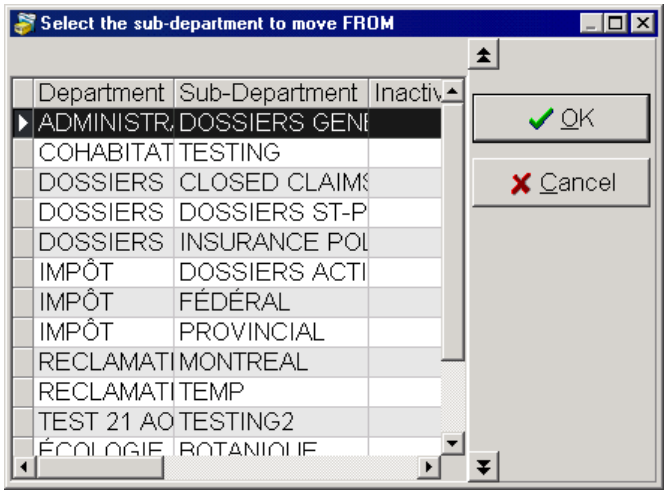
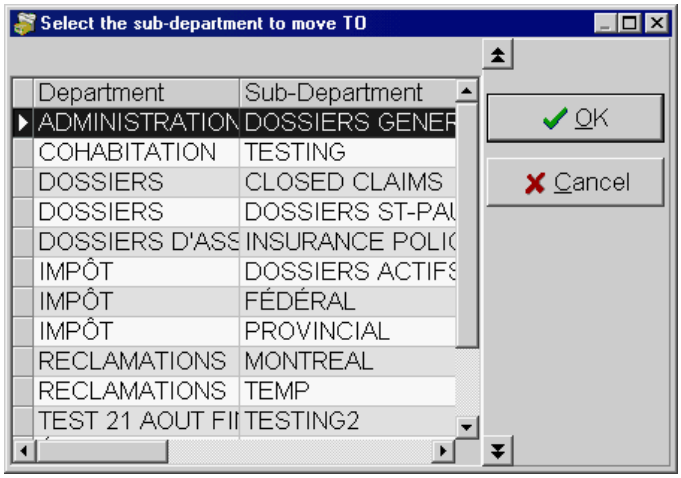


3 Enter the code of the desired customer and press **OK**.

4 Click on **Department**->**Sub to Sub-Department**. A window opens.



5 Select the sub-department to be transferred (it will appear highlighted) and press **OK**. A window is displayed on the screen.



6 Select the target sub-department (it will appear highlighted) and press **OK**. The system proceeds to update the information.

Note: This kind of measure would take place if a sub-department had merged with another sub-department in a company.

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9.4.4 Rebuild Space Usage

9.4.4.1 Overview (Rebuild Space Usage)

This module facilitates maintenance if the system no longer accurately reflects the amount or position of the boxes, or if an area of the record center that currently stores one type of box is to be re-allocated for storage of a different type of box.

Available reports

- Location integrity report - checks for locations where the reported number of boxes in a location in the location table do not match the number of boxes assigned to the location in the box table.

Fields (None)

Tasks

- Recalculating available storage space [401]
- Systematically rescanning boxes to correct the inventory
- Re-allocate locations for a different box type

Distinctive menu options:

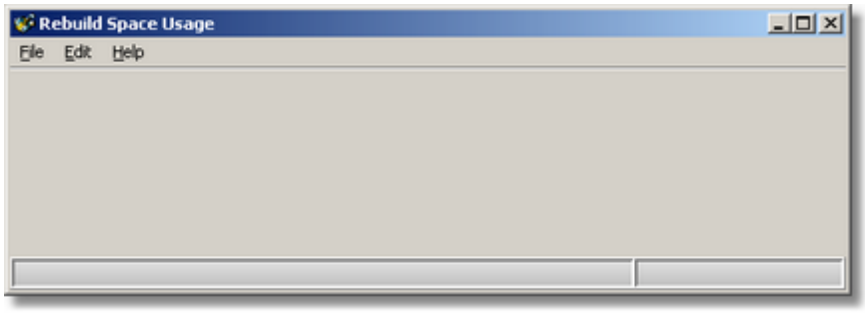
File menu

- View Report -> Location integrity report [402]
- Rebuild Space Usage [401]

Edit menu

- Rescanning process [404]

Module window



9.4.4.2 Recalculating available storage space

This operation re-calculates the available space for each location based on the reported location of each box and tape. It is important to perform this operation after manual operations that affect inventory, such as checking boxes IN or OUT, creating boxes in the IN state, and importing boxes to the IN state.

1. Open the **Maintenance->Rebuild Space Usage** module.

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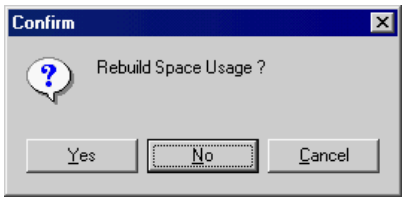
2. Click on **File->Rebuild Space Usage**. A dialog box appears.



3. Click on the **Yes** button to confirm the operation. A box is displayed during the treatment and indicates that the system is going through all the locations defined at the record center.

9.4.4.3 Viewing or printing a location integrity report

The system safeguards against integrity errors in most instances. However, operations such as changing customer or location parameters, performing manual maintenance that bypasses the system, or exceptional circumstances may cause inconsistencies to accumulate over time.

The location integrity report cross-checks the database for the following integrity errors:

- Duplicate box label
- Invalid location label (does not match the location mask)
- Non-Existent location label (location assigned to a box does not exist as a location in the system)
- Customer not found
- Location is full
- Exclusive Location (Location of a box has been assigned to a different customer)
- Box must be in vault (or not in vault)
- Customer limited to a building

In principle these errors should not occur if all boxes and locations have been managed since the beginning.

Using the report is a tool that might be helpful before re-scanning the warehouse, it will tell you about any inconsistencies in your inventory.

It is used to preview what the inconsistencies in you inventory look like before hand for a particular section or your whole warehouse.

This report can also be ran every few months simply to verify that your inventory is in good shape.

1 Click on Management->Rebuild Space Usage from the Main window.
2 Click on File->View report->Location Integrity report. A window appears.

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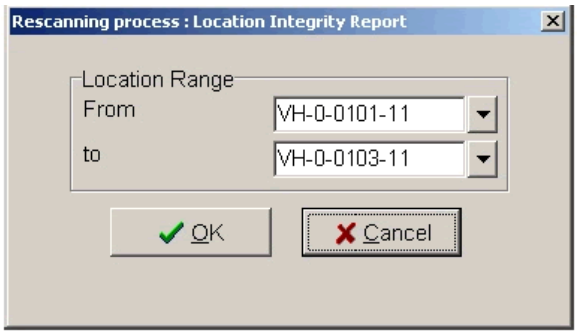
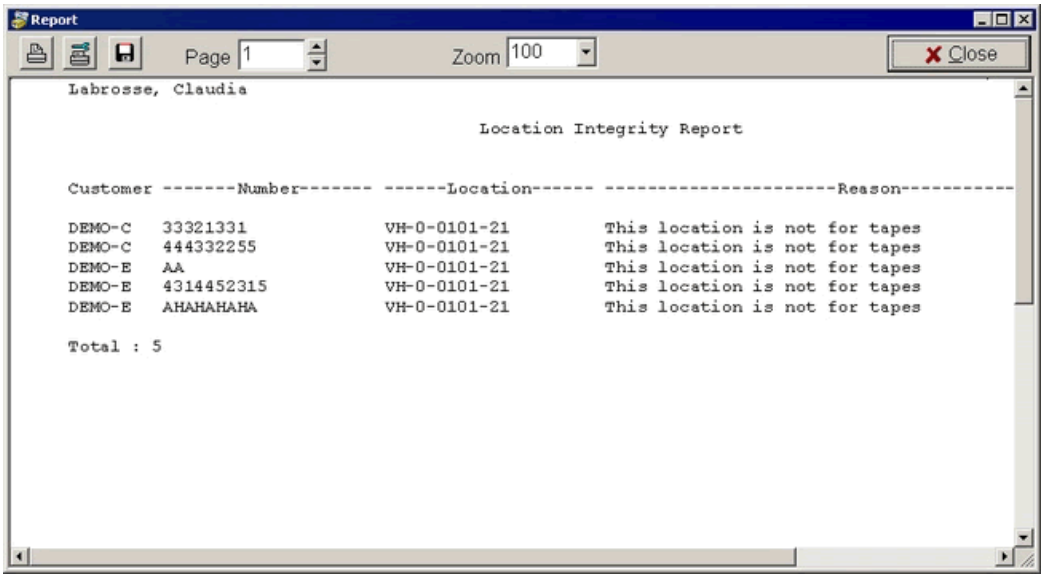


Note: The location range and transit location fields will no doubt have different values than the ones indicated
in the picture but will reflect your own locations.

3 Enter a Location Range and Press OK. The report will appear on the screen for you to review.

Ex:


Report
Page 1
Zoom 100
Close
Labrosse, Claudia
Location Integrity Report
Customer -------Number------- ------Location------ ----------Reason----------
DEMO-C 33321331 VH-0-0101-21 This location is not for tapes
DEMO-C 444332255 VH-0-0101-21 This location is not for tapes
DEMO-E AA VH-0-0101-21 This location is not for tapes
DEMO-E 4314452315 VH-0-0101-21 This location is not for tapes
DEMO-E AHAHAHAHA VH-0-0101-21 This location is not for tapes
Total : 5

Here is a list of possible integrity errors the report will show:

- Duplicate box label
- Invalid location label
- Non-Existent location label
- Customer not found
- Location is full
- Exclusive Location
- Box must be in vault/or not
- Customer limited to a building

4 To print the report, press on the Print button.

You can now start the Rescanning process[404] if you desire.

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9.4.4.4 Rescanning process

Before considering rescanning locations, it would be important to run the location integrity report[402].

The following topics will guide you in the process of re-scanning your warehouse. The reasons why you might want to do this are:

- Your inventory has become mixed-up over time and you need to re-validate your current inventory
- You need to assign certain areas of your warehouse to specific box volume and capacity

Note: In order for the re-scanning process to be done properly, we suggest that you:

- Create/Use a DIFFERENT transit location for your re-scanning process than the ones you usually use in your daily operations. If more than one employee re-scans at the same time, a different transit location for each employee should be used. You'll also need to create another transit location that will be used for the "Lost Boxes". You don't need to create more than one location for the lost boxes(you can if you really want to but that might become harder to keep track of and manage)

- Be aware of what is in this location BEFORE you start a new re-scanning job so that you don't waste time dealing with boxes that are not part of your re-scanning process (Although if the re-scanning process is done right, your transit location should be empty after each successful re-scan).

- Whoever does the re-scanning should make the other employees of the record center aware of this(with verbal communication and also perhaps by placing some cones in front of the section being scanned).The reason for this is that pickers should NOT refile boxes in the section being re-scanned as this can lead to inconsistencies in EDC.

- Only do a small section at a time. This will help you find lost boxes faster in the concerned section if ever need to do so. It will also keep your section's refiling downtime to a minimum when doing so.

1. Click on **Management->Rebuild Space Usage** from the Main window.
2. Click on **Edit->Rescanning process**

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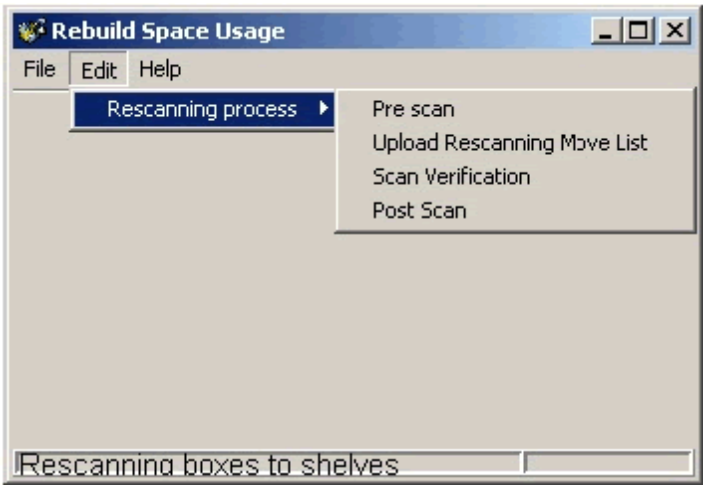
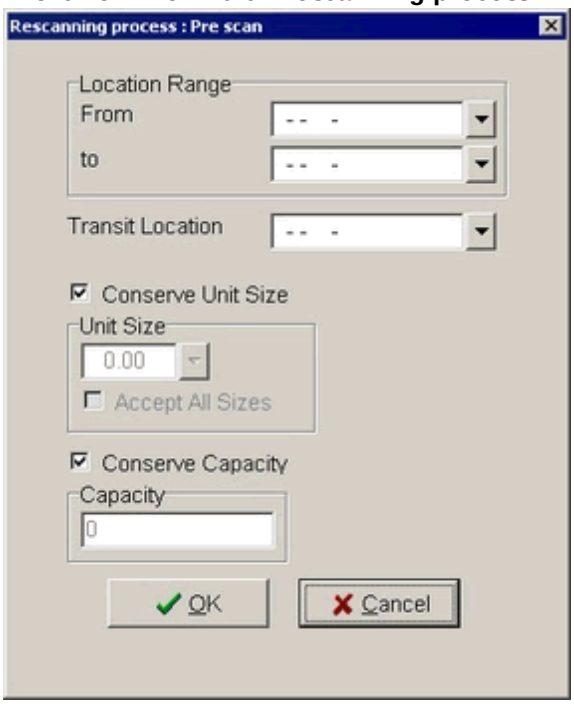


See the following topics for a detailed step by step procedure :

- Pre scanning items 405
- Uploading a rescanning move list 407
- Verifying the scan 408
- Post scanning 408

9.4.4.4.1 Pre scanning

1. Click on **Management->Rebuild Space Usage** from the Main window.
2. Click on **File->Edit->Rescanning process->Pre scan** . A window appears.



Note: The location range and transit location fields will no doubt have different values than the ones indicated
in the picture but will reflect your own locations.

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What the fields mean:

- **Location Range :** This corresponds to the range of locations you currently want to do the scanning

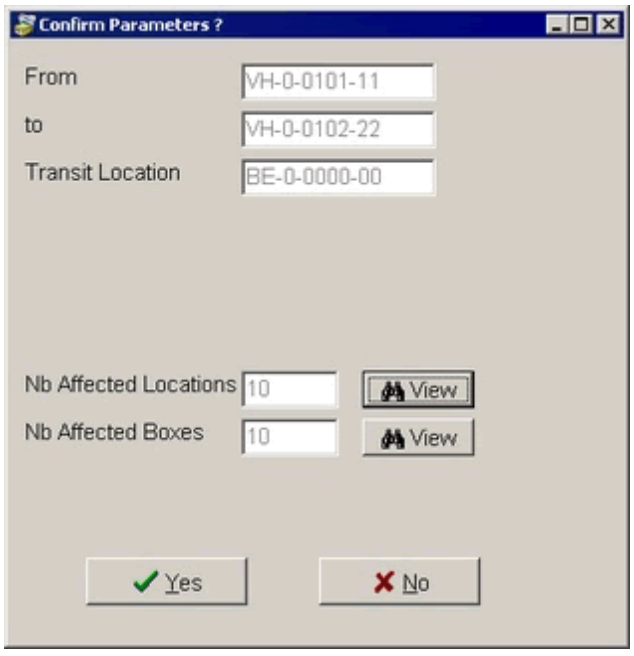
for. You probably won't want or even have the time to do your whole warehouse at once and so these fields enable you to scan your warehouse one section at a time if needed.

- **Transit Location :** This is the location where the boxes from the "Location Range" above get moved to after the Pre Scan step is complete.

Note that there is no actual need to physically move the boxes to that location.
The re-scanning process is basically just a "fancy" move and so during the re-scanning process EDC transfers the boxes to that transit location to be able to make a proper move from the transit location back to their actual shelf locations.

- **Unit Size Options :** These options are used to either change your location range's unit size or to leave it as is. If you don't want to make changes to your unit size, you simply leave this option as is. Otherwise if you wish to assign a new value you just deselect the "Conserve Unit Size" option and choose a new value or you can select the "Accept All Sizes" if you wish to allow all box sizes.
Same goes for the capacity option.
The Unit size and Capacity options at this point only affects the Locations from the Location module. The boxes are not affected at this point.

3. Enter the different parameters and press **OK**. A window appears.



4. To view the report of affected locations or the report of affected boxes, press on the **View** button beside the field. The report will automatically be previewed.

5. Press **OK** to confirm the parameters. A confirmation message appears :

Ex:

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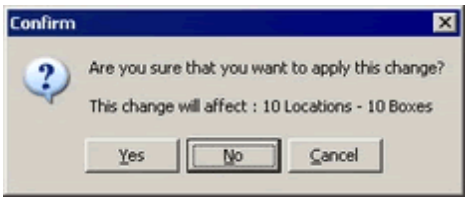

6. The location of the boxes will be changed for the transit location that was previously selected.

7. A move with the PDT[766] should now be performed.

9.4.4.4.2 Uploading a rescanning move list

Before uploading this move list, consult the following topics :

- Rescanning process[404]
- Pre scanning items[405]

1. Click on **Management->Rebuild Space Usage** from the Main window.
2. Click on **File->Edit->Rescanning process->Upload rescanning move list**.
3. Prepare the PDT to send information (**Send results -> Move**).

The results of the move are analyzed. The system :

- Updates the locations of the boxes in the box module and may change the state of the boxes depending on the previous state they were in. All boxes retain their original state except for boxes that were in the "OUT" and "PRE ADD" state. These states get changed to "IN" after the upload.

- Creates an error report if your move conflicts with the size & capacity of the locations you are scanning

and will keep the boxes in the transit location in such a case, at which point you will have to deal with those boxes on a case by case basis and figure out what needs to be done.

Here is a list of possible errors and warnings contained in the report:

Will produce error if:	Will produce warning if:
invalid box label	Box size not matching location size
non-existent box	Activity changed (Out & Preadd to in)
box on deletion list	
box in terminal state (Deleted, Transferred & Destroyed)	
invalid location label	
non-existent location label	
Customer not found	
Location is full	
Exclusive Location	
Box must be in vault/or not	
Location can't contain tape	
Customer limited to a building	

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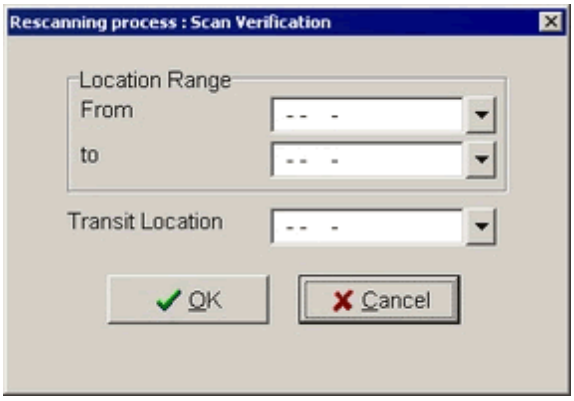
9.4.4.4.3 Verifying the scan

This step is simply a report of your Move Upload. It summarizes all the boxes that have been left in the transit location due to move errors. It also shows the location's capacity that you should appear in the Location module.

1. Click on **Management->Rebuild Space Usage** from the Main window.
2. Click on **File->Edit->Rescanning process->Scan verification**. A window appears.



Note: Normally the locations that have been entered in the previous steps will appear in the Location Range and the Transit Location.

3. Press **OK**. A double report is automatically created.

If the report shows that some boxes are still in the transit location this usually mean that there has been an error during the move (skipped a box during the scan?).

It would be important to re-check if you have indeed skipped a box and re-scan the boxes in these locations, then re-upload the move results again.

If you are sure that no boxes were forgotten and the report still shows that there is boxes in the transit location, refer to the Post scanning[408] operation, at which time the remaining boxes from the transit location will be moved to the "lost boxes" transit location.

In summary, you should repeat the rescanning process (move, upload results, verification) as many times as you think necessary until the boxes are found, if some are not, the Post scanning[408] operation should be performed.

9.4.4.4.4 Post scanning

This step is used to move the boxes that were left in the transit location, to the "Lost Boxes Transit Location" . The system can also adjust the capacity and volume of both the locations and boxes accordingly. It also "cleans" the transit location to be ready for another re-scanning session

1. Click on **Management->Rebuild Space Usage** from the Main window.
2. Click on **File->Edit->Rescanning process->Post scan** . A window appears.

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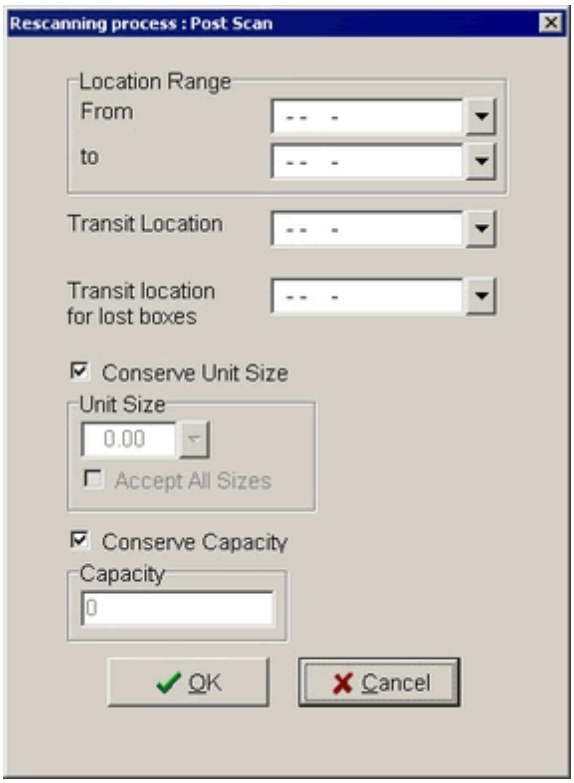

NOTE: Make sure that the transit location is empty (except for lost boxes) before doing this because otherwise it will
move those items to the "Lost Boxes" transit location. Something we don't want to happen when doing this.

Take note that these changes are done to the boxes AND the locations if the unit size is changed.

3. Choose a Location Range, and change the Capacity and the Unit Size if need be. Press **OK**. A window appears.

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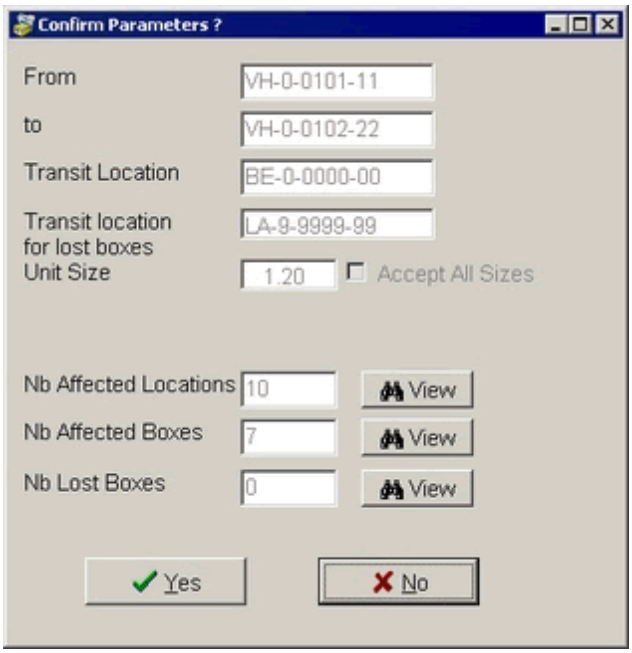
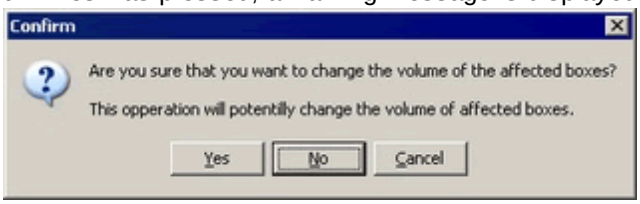
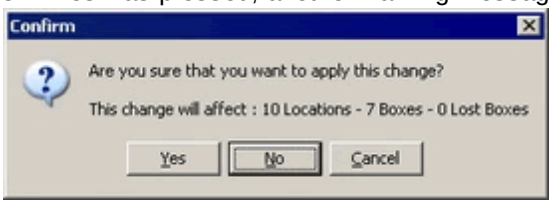


4. To view a report of affected locations, affected boxes or lost boxes, press on the **View** button at the right of the field.
5. If you want to continue with the changes, press **Yes**. If you want to cancel the operation press **No**.
6. If Yes was pressed, a warning message is displayed :


Confirm
Are you sure that you want to change the volume of the affected boxes?
This opperation will potentilly change the volume of affected boxes.
Yes
No
Cancel

7. If you want to continue with the changes, press **Yes**. If you want to cancel the operation press **No** or **Cancel**.
8. If Yes was pressed, another warning message is displayed :


Confirm
Are you sure that you want to apply this change?
This change will affect : 10 Locations - 7 Boxes - 0 Lost Boxes
Yes
No
Cancel

9. If you want to continue with the changes, press **Yes**. If you want to cancel the operation press **No** or **Cancel**.
10. If Yes was pressed, a password is demanded. Enter your **password** and Press **OK**.
11. The changes will be applied in the Box and/or the Location modules.
12. Any errors encountered is displayed.

9.4.5 Remove PRE ADD

9.4.5.1 Overview (Remove PRE ADD)

PRE ADD boxes have identities in EDC RC but have not yet been added to the inventory. Customers can affix labels for tracking and record information about the boxes using ActiveWeb. However, the record center has never assumed any responsibility for these boxes, and they may not even exist. Therefore, it is possible to delete PRE ADD box and file records from the system.

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This module permits the batch-deletion of boxes in PRE ADD for a customer.

Available reports

- None.

Fields

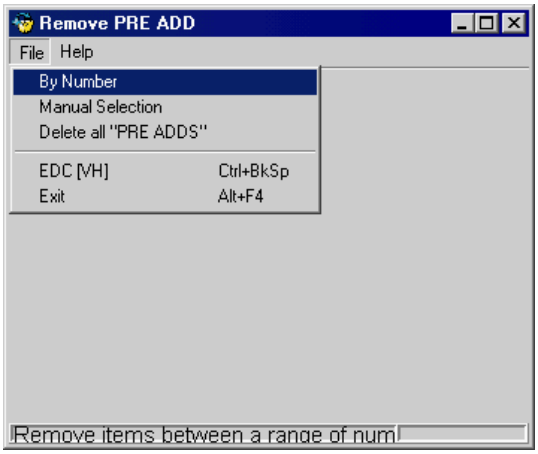
- None.

Distinctive menu options:

File menu

- By Number (Delete boxes in PRE ADD for a customer within a range of customer box numbers).[411]
- Manual Selection (Select boxes from a list to remove from PRE ADD)[412]
- Delete all "PRE ADDS" (delete all PRE ADD boxes of a customer)[413].

Module window:



9.4.5.2 Batch deleting boxes in PRE ADD for a customer

This operation deletes boxes in PRE ADD falling within a range of customer box numbers for a customer.

WARNING ! This operation cannot be undone. It permanently removes any data entered for these boxes, and will make any associated bar code labels invalid. All labels for deleted PRE ADD items should be destroyed to prevent confusion.

1. Click on **Maintenance->Remove PRE ADD** from the Main window.
2. Click on **File->By number**. A window appears.

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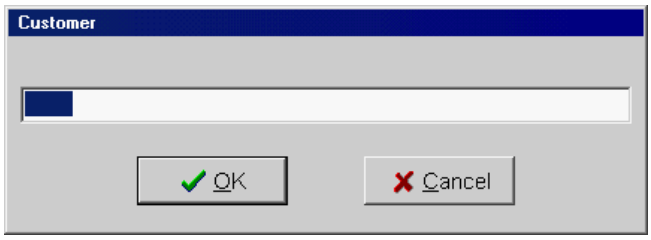
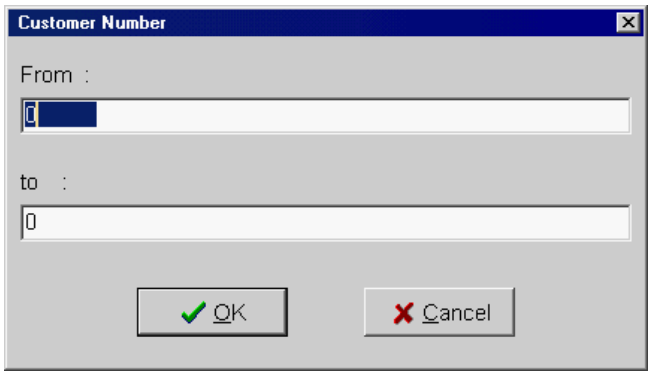
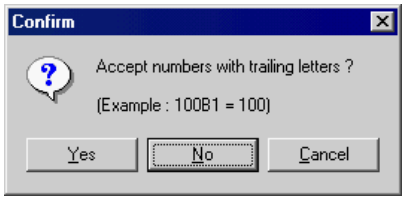


3. Enter the code of the desired customer and press **OK**. A new window appears.



4. Enter an interval of number of boxes and press **OK**. A dialog box opens on the screen.



5. Click on the **Yes** button to include numbers containing letters. The system automatically proceeds to the deletion of all the boxes in PRE ADD for which their number is included in the interval previously entered. As soon as the deletion is approved, all the data about these boxes disappear and is not retrievable anymore.

9.4.5.3 Manually selecting boxes to delete from PRE ADD for a customer

This operation allows to delete specific PRE ADD boxes.

WARNING ! This operation cannot be undone. It permanently removes any data entered for these boxes, and will make any associated bar code labels invalid. All labels for deleted PRE ADD items should be destroyed to prevent confusion.

1. Click on **Maintenance->Remove PRE ADD** from the Main window.
2. Click on **File->Manual Selection**. A window appears.

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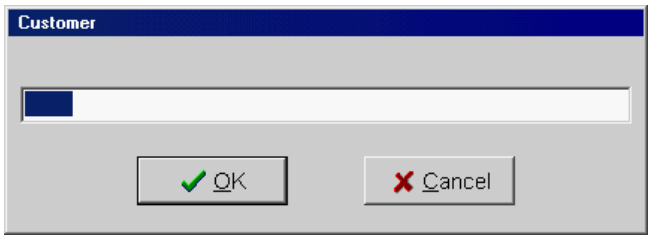
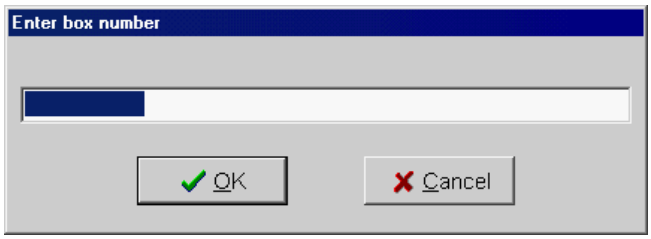
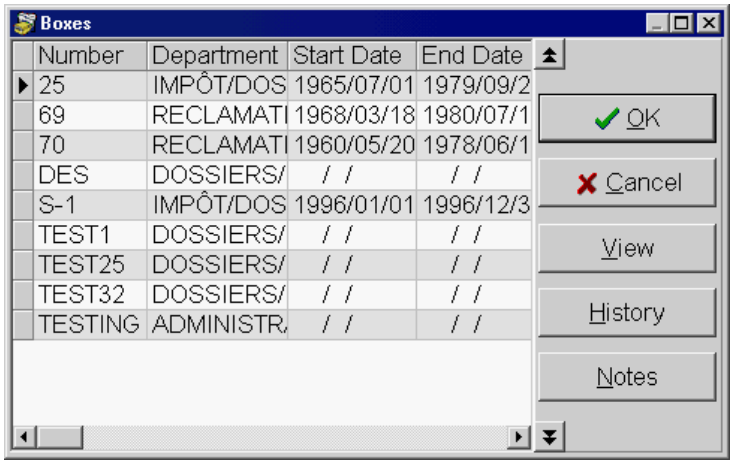


3. Enter the code of the desired customer and press **OK**. A new window appears.



4. Enter the number of a box to be deleted and press **OK**. A window opens, containing the list of all the boxes in PRE ADD for this customer.



5. Select the desired boxes (they will appear highlighted) and press **OK**. The system automatically proceeds to the final deletion of these boxes in the inventory.

9.4.5.4 Deleting all the PRE ADD boxes of a customer

With this operation, all the PRE ADD boxes of a customer are deleted from the inventory. It is necessary to first ensure that the customer does not have any valid boxes in PRE ADD before performing this operation.

WARNING ! This operation cannot be undone. It permanently removes any data entered for these boxes, and will make any associated bar code labels invalid. All labels for deleted PRE ADD items should be destroyed to prevent confusion.

1. Open the **Maintenance->Remove PRE ADD** module
2. Click on **File->Delete all "PRE ADDS"**. A window opens.

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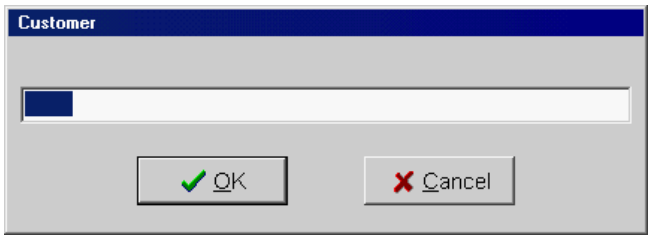
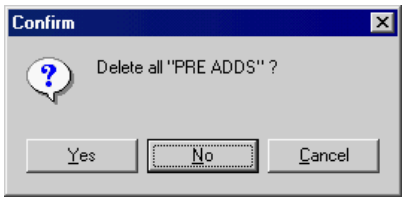


3. Enter the code of the desired customer and press **OK**. A dialog box appears.



4. Click on the **Yes** button to confirm the operation. After deletion, all the information about these boxes disappears permanently from the system.

9.4.6 Box and File Maintenance

9.4.6.1 Overview (Box and File Maintenance)

This module permits maintenance operations that do not fall within the standard work flow for boxes and files. It should be used with caution.

Available reports

- Replication log
- Replication times

Fields (none)

Distinctive menu options:

File menu

- Print alternate labels (Printing alternate labels for boxes and files 426)
- Auto-create PRE ADD boxes (Auto-creating boxes in PRE ADD and printing bar code labels 427)
- Auto-create PRE ADD files (Auto-creating files in PRE ADD and printing bar code labels 428)
- Auto-create PRINTED boxes | files 429
- Auto-create PRE ADD tapes 427
- Import (Importing data using a description file 430)
- Import data with wizard 430
- Import images (Importing images 440)
- Upload vault transfer move list 441
- Upload resize move list 442
- Index customers 442
- Replication log 443

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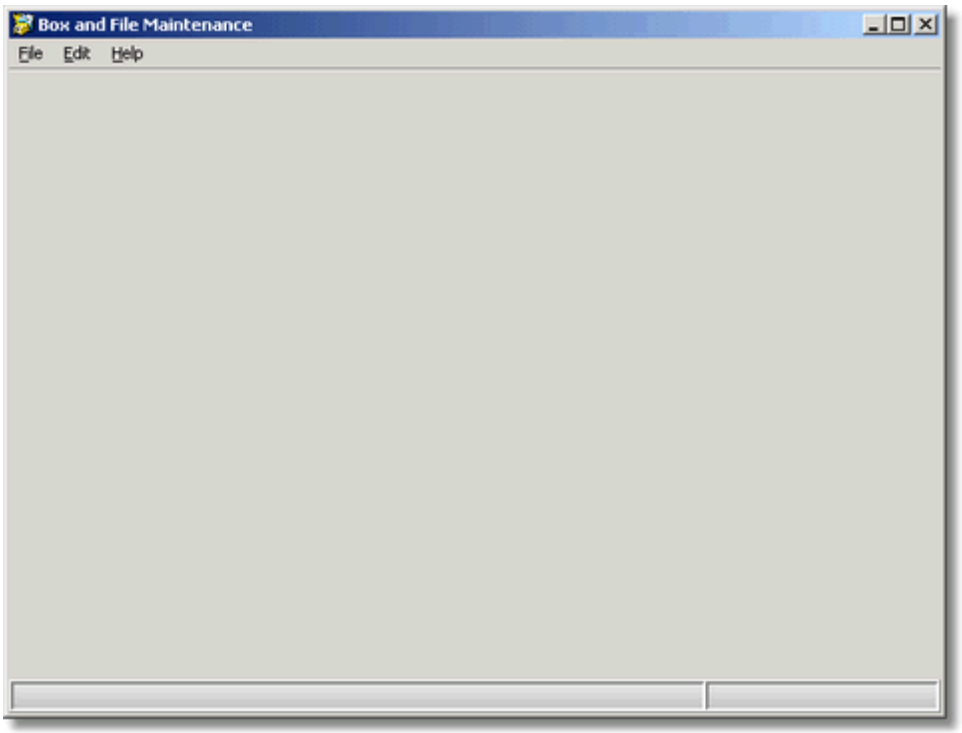
- Replication times 443

Edit menu
- Check IN box 415
- Check OUT box 415
- Check IN file 415
- Check OUT file 415
- Transfer box to PRE ADD 417
- Transfer file to PRE ADD 417
- Edit box history 417
- Edit file history 417
- Field Update (Updating fields for boxes and files 424)
- Field Transfer (Transferring the content of fields for boxes and files 419)
- Inter-client move (Transferring boxes of a customer to another customer-> 420 By box | By department)
- Adjust box disposal from files 422
- Recalculate box disposal dates***
- Recalculate file disposal dates***
- Recover boxes from backup 443
- Recover files from backup 443
- Delete all images in a file 444

Module window:



9.4.6.2 Individually returning or retrieving a box or a file

This operation can be useful to correct errors which occur during returns or deliveries. Unless otherwise informed, there is no charge for these operations, because the documents are already supposed to be returned or retrieved.

1 Click on **Maintenance**->**Box and File Maintenance** from the Main window.

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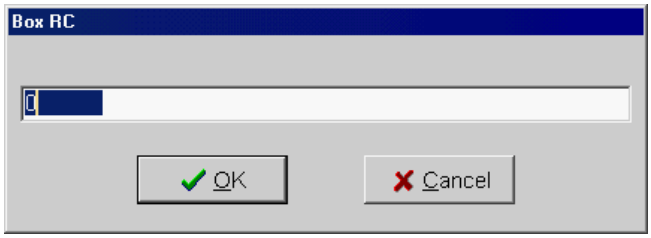
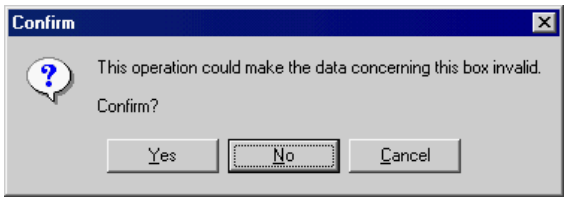
2 Click on **Edit ->Check IN Box|Check Out Box|Check In File|Check Out File**. A window appears and allows to specify which customer is concerned.

3 Enter the code of the customer and press **OK**. A window opens.



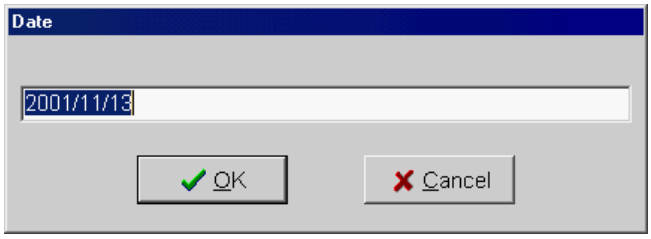
Note : A similar window appears for files.

4 Enter an RC number and press **OK**. A dialog box appears.



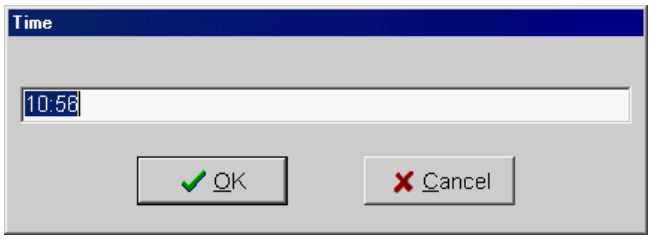
Note : Documents which are retrieved must be in the PRE ADD or OUT state, and documents which are returned must be in the IN state.

5 Click on the **Yes** button to confirm the operation. A window is displayed on the screen.



Note : The current date is displayed by default. This date will appear in the document's history, in order to indicate the retrieval or return date.

6 Modify the date if so necessary and press **OK**. A window appears.



Note : The current time is displayed by default. This time will appear in the document history, in order to indicate the retrieval or return moment.

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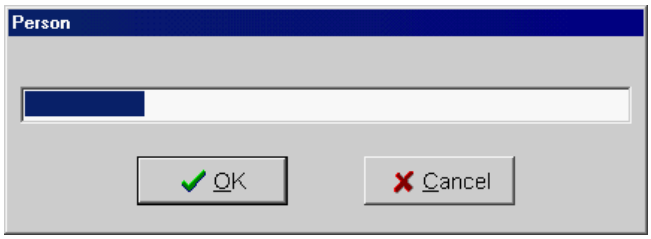
7 Modify the time if so desired and press **OK**. According to the operation that is being performed, the system proceeds as follows :

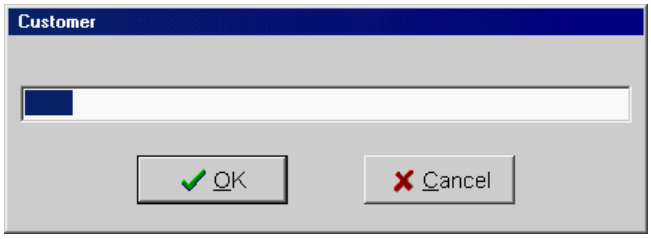
- When returning a document, the update of information is automatic. The changes are viewable in the Box and File module.
- When retrieving a document, a window appears.



Enter the name of the person to which the document was delivered and press **OK**. The information is updated in the Box and File modules.

9.4.6.3 Transferring a box or a file to PRE ADD

1 Click on **Maintenance**->**Box and File Maintenance** from the Main window.
2 Click on **Edit-> Transfer Box to Pre Add|Transfer File to Pre Add**. A window appears.



3 Enter the code of the customer in question and press **OK**.
4 Enter the RC number of the desired document in the window that is displayed and press **OK**. The system proceeds to the update of the information and the state of the document is changed to PRE ADD.

9.4.6.4 Editing the history of a box or a file

Every operation performed on boxes and files is registered in their history. This information can be consulted in the Box and File modules by clicking on **F3**. Generally it is better to keep the original information but it can be necessary to change some of them, such as described here.

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1. Click on **Maintenance->Box and File Maintenance** from the Main window.
2. Click on **Edit ->Edit Box History|Edit File History**. A window appears and asks to specify which customer is concerned.
3. Enter the code of the desired customer and press **OK**.
4. Enter the RC number of the desired document in the window that is displayed and press **OK**. A window opens on the screen.

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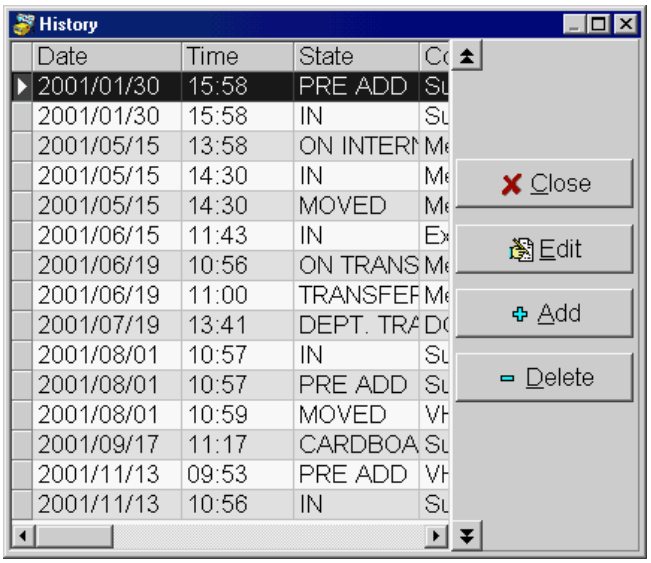
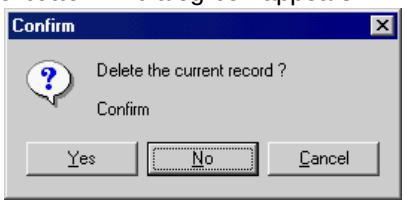


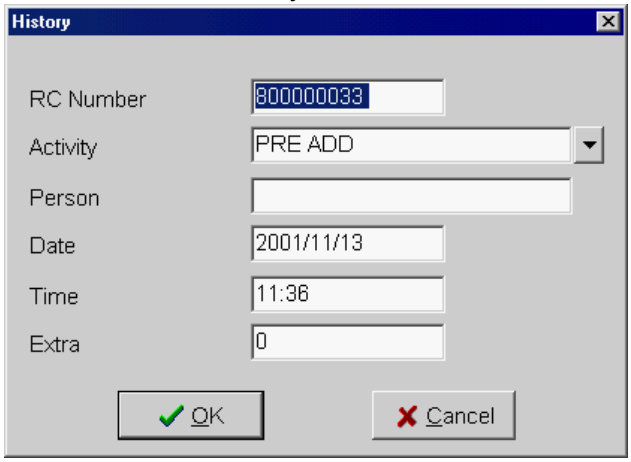
5. Performing one of the following operations :

- To delete a part of the history, select the desired line (it will appear highlighted) and click on the **Delete** button. A dialog box appears.



Click on the Yes button to confirm the operation.

- To add information to the history, click on the **Add** button. A window appears.



RC Number : this field indicates the RC number given to the document by the system and cannot be modified.
Activity : this field allows to specify an activity for the document.
Person : this field allows to enter the name of the person related to the action (recipient, requester, etc).
Date : this field allows to enter a date for the action. The current date is displayed by default but can be modified. The new line is displayed in the history according to this date.
Time : this field allows to enter a time for the action. Consequences are the same as for the date.
Extra : this field allows to enter additional information.

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Enter the correct information in the appropriate fields (see their description below) and press OK. This information will be displayed in the history of the document on a new line.

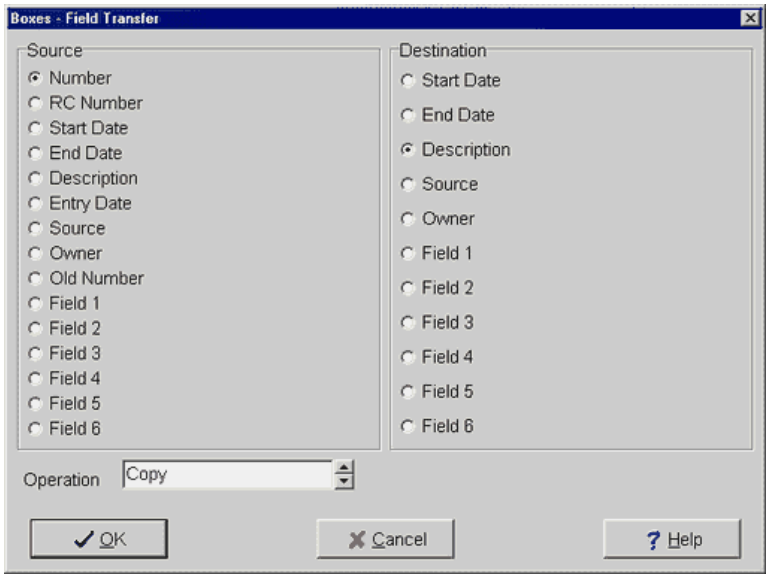
- To modify an existing part of the history, select the related line (it will appear highlighted) and click on the Edit button. Proceed to the desired changes as done previously when adding new information to the history.

6. When finished, click on the **Close** button.

9.4.6.5 Transferring the content of fields for boxes and files

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1 Click on **Maintenance**->**Box and File Maintenance** from the Main window.
2 Click on **Edit**->**Field Transfer**->**Boxes|Files**. A window appears and asks to specify which customer is concerned.
3 Repeat steps **3** to **8** inclusively from the previous section to establish a selection of documents. Here is the window displayed after following these steps.



4 Check a Source field and a Destination field, select the operation to be performed by clicking on the drop-down button. Three operations can be performed :

- Copy : the content of the Source field is copied in the Destination field; the original content of the Destination field disappears; the Source field does not change.
- Swap : the content of the Source field is transferred to the Destination field and vice versa. The original content of both fields is kept but not displayed at the same place.
- Move : the content of the Source field replaces the content of the Destination field; the original content of the Destination field is deleted; the Source field is emptied.

5 Press **OK** to register the operation. Some dialog boxes appear and allow to confirm the operations. They also notify the user of the major changes that can occur in the inventory after having performed these operations.
6 Press **OK** in all of these dialog boxes. A window appears.

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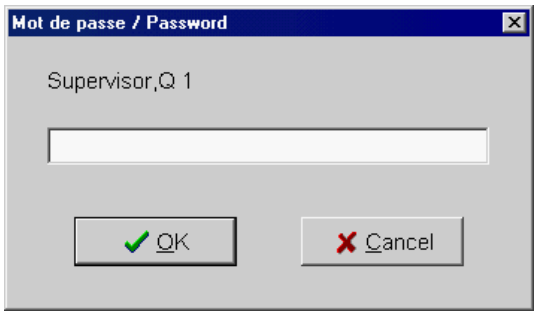


7 Enter the password and click on the **OK** button. The system automatically updates the inventory. The relevant modifications are viewable in the Box and File modules (a general change will appear in the history of the selected boxes or files.)

9.4.6.6 Transferring boxes of a customer to another customer

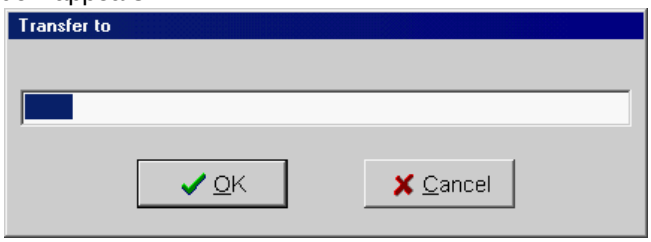
Companies may merge or divide, and it is not uncommon for professionals to move from one firm to another, bringing customers and records with them.

Before doing an inter-client move it is important to check that all the returns for both customers are in the VERIFIED state, and that no items are on internal transfer lists.

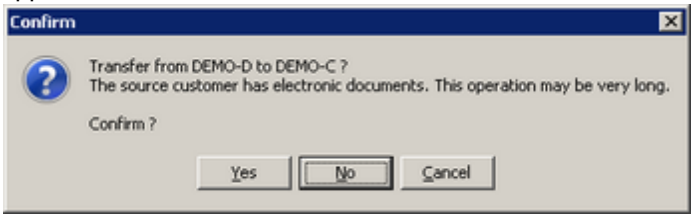
WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

By box:

1. Open the **Maintenance->Box and File Maintenance** module.
2. From the menu, select **Edit->Inter-client Move->by box**. A confirmation dialog box appears
3. Click on the **Yes** button. A dialogue box prompts Transfer From.
4. Enter the customer key of the customer for which boxes will be transferred and press **OK**.
5. A window appears.



6. Enter the customer key of the customer to which boxes are transferred and press **OK**. A dialog box appears and asks to confirm the intent to transfer between these two accounts.



7. Click on the **Yes** button to confirm the operation.

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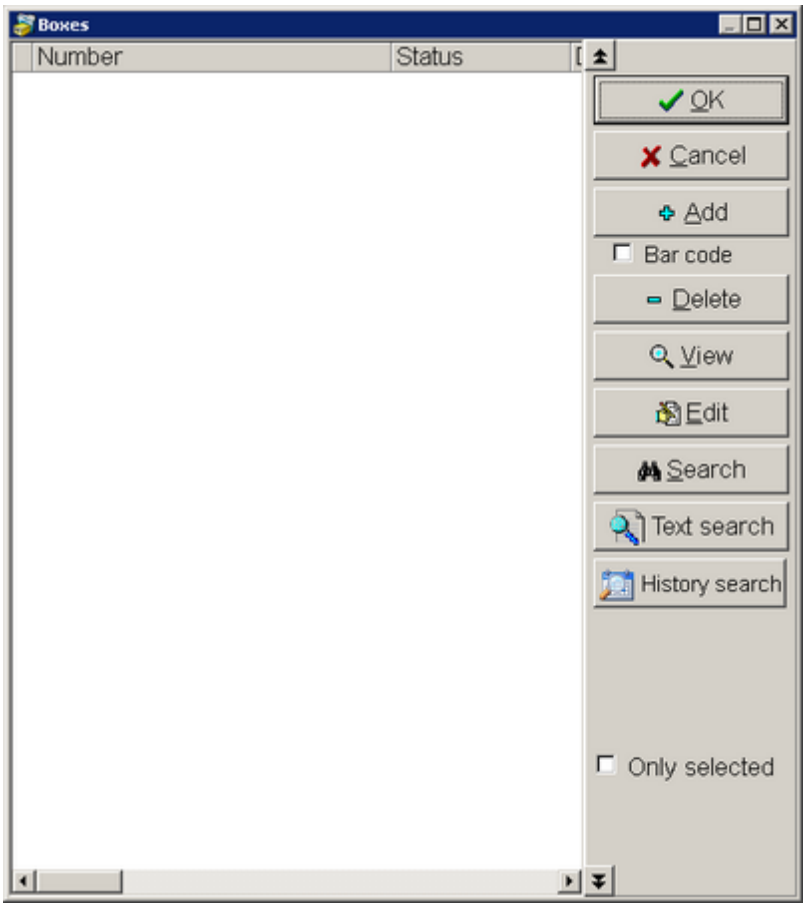
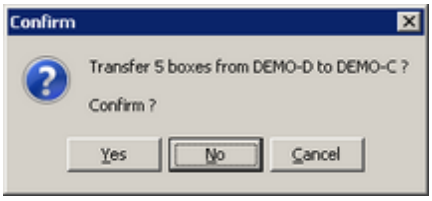


8. Use the window that appears to **build a list of boxes** to transfer, using any of the standard box searches[492]. Click **OK** when finish.

(**Note** that if the "Only selected" box at the bottom is checked, only those items highlighted in black will be transferred.)

- If some boxes are on an internal transfer list or on a delivery that is not verified, a report is displayed. Either resolve the situation, or remove the items from the list, then press **OK** again.



9. Click on the **Yes** button to confirm the transfer. The system automatically updates the inventory. Records in the old account are marked as Transferred. Items in their new account will have the current status of the physical item. The bar code of the box will be added as an "alternate label", since the new record has a different customer number and different RC number.

By department:

1. Open the **Maintenance->Box and File Maintenance** module.
2. From the menu, select **Edit->Inter-client Move->by department**. A confirmation dialog box appears.

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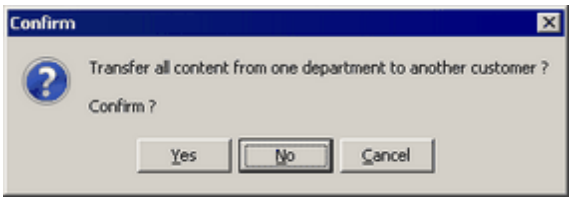
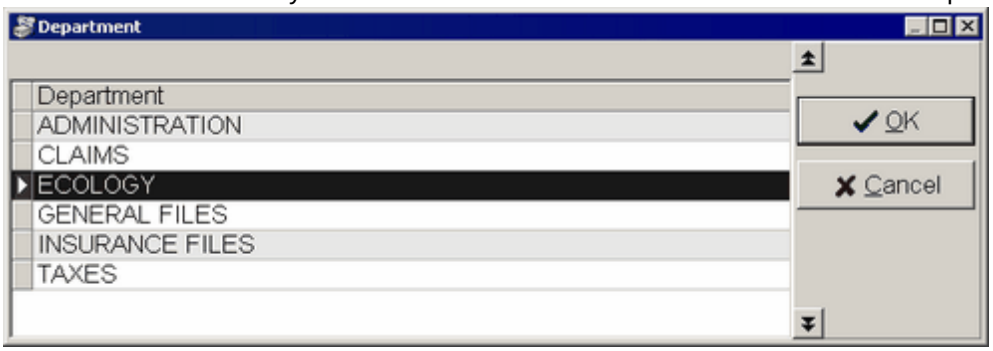
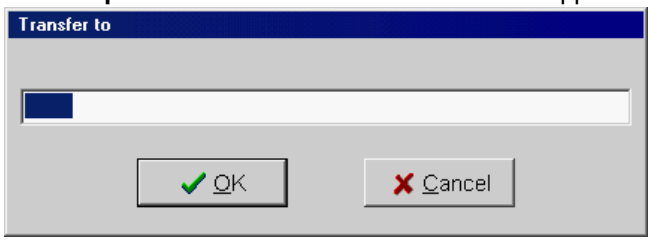


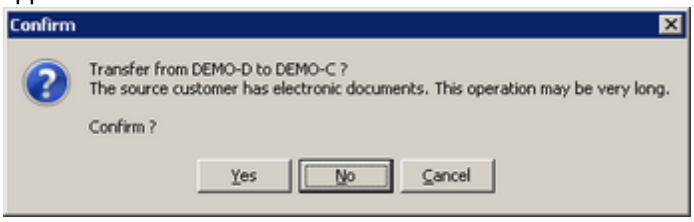
3. Click on the **Yes** button. A dialogue box prompts Transfer From.
4. Enter the customer key of the customer for which boxes will be transferred and press **OK**.



5. **Select the department** to transfer from the list that appears and click **OK**. A window appears.



6. Enter the customer key of the customer to which boxes are transferred and press **OK**. A dialog box appears and asks to confirm the intent to transfer between these two accounts.



7. Click on the **Yes** button to confirm the operation.
8. Enter your **password** and press **Enter**.
9. Click on the **Yes** button to confirm the transfer.
10. Enter your **password** and press **Enter** a second time.
11. If there are no errors, the system automatically updates the inventory. Records in the old account are marked as Transferred. Items in their new account will have the current status of the physical item. The bar code of the box will be added as an "alternate label", since the new record has a different customer number and different RC number.

Note: Once an inter-client move has been performed, the customer key on the old label will no longer match the account that it belongs to. This makes the truck validation step even more important. It may also be worth re-labeling these boxes as they are encountered on returns.

9.4.6.7 Updating the disposal date of a box based on files

EDC manages destruction by the box destruction date, but sometimes customers provide destruction information on the files rather than the box. This function determines the most rigorous disposal mode

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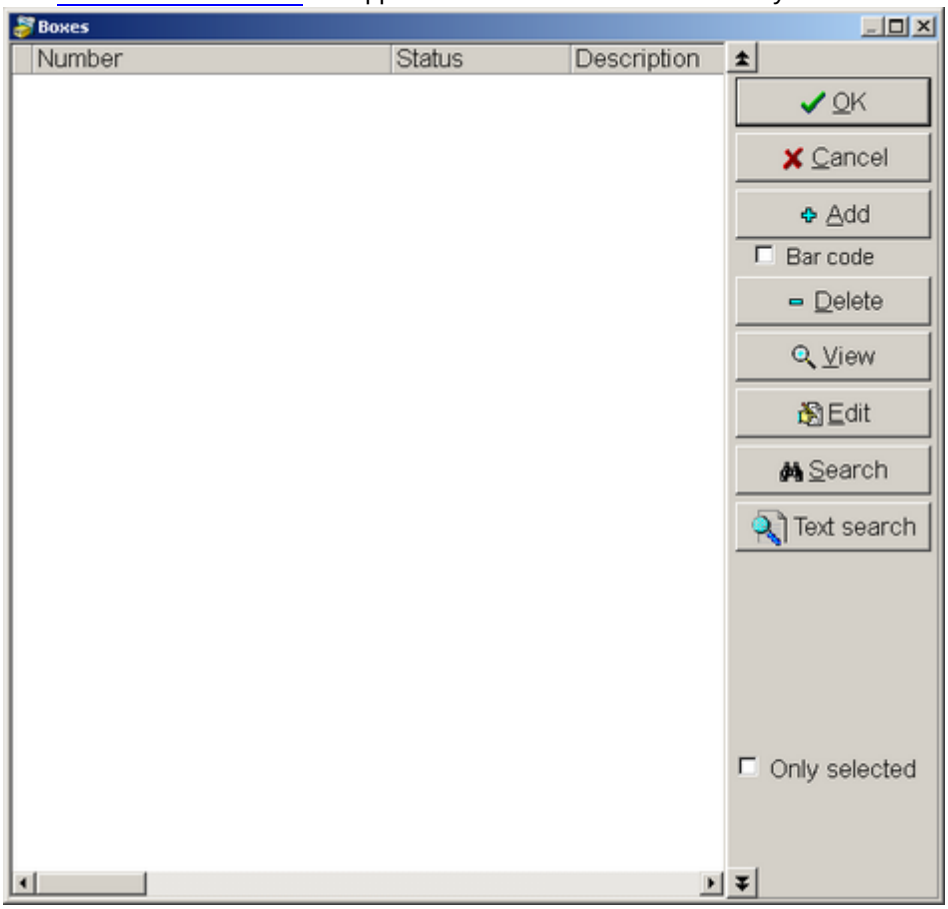
and the latest disposal date on files in the box, and will increase the disposal on the box to match if necessary, and sets it to FIXED disposal. Withdrawn files and boxes are ignored. The disposal date or mode will never be reduced.

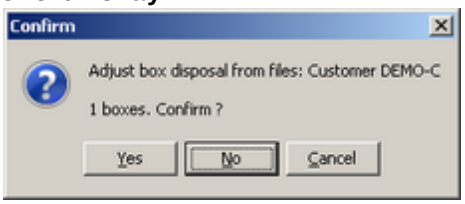
Disposal modes: PERMANENT > SEND TO DEPOT > SAMPLE > REVISION > CONFIDENTIAL > NON CONFIDENTIAL > NONE.

When this operation changes disposal parameters it adds history items indicating the previous disposal and who performed the change.

1. From the **Maintenance->Box and File Maintenance** module, select **Edit->Adjust box disposal date from files**.
2. A confirmation box appears, "Adjust box disposal from files ?" Click **Yes** to confirm.
3. A dialogue box appears, "Customer". Enter a **customer key** and click **OK**, or click **OK** to select a customer from the list.
4. A box selection window[487] appears. Use this search functionality to build a list of boxes to modify.



5. Click **Okay**.



6. A confirmation window appears. Click **Yes** to confirm.
7. Type your password and click **Okay** or press **Enter**.

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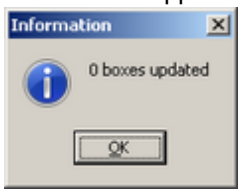
8. If any of the boxes require updating, the boxes will be updated and their disposal calculation will be set to Fixed.
9. A window appears, displaying the number of records that have been changed.

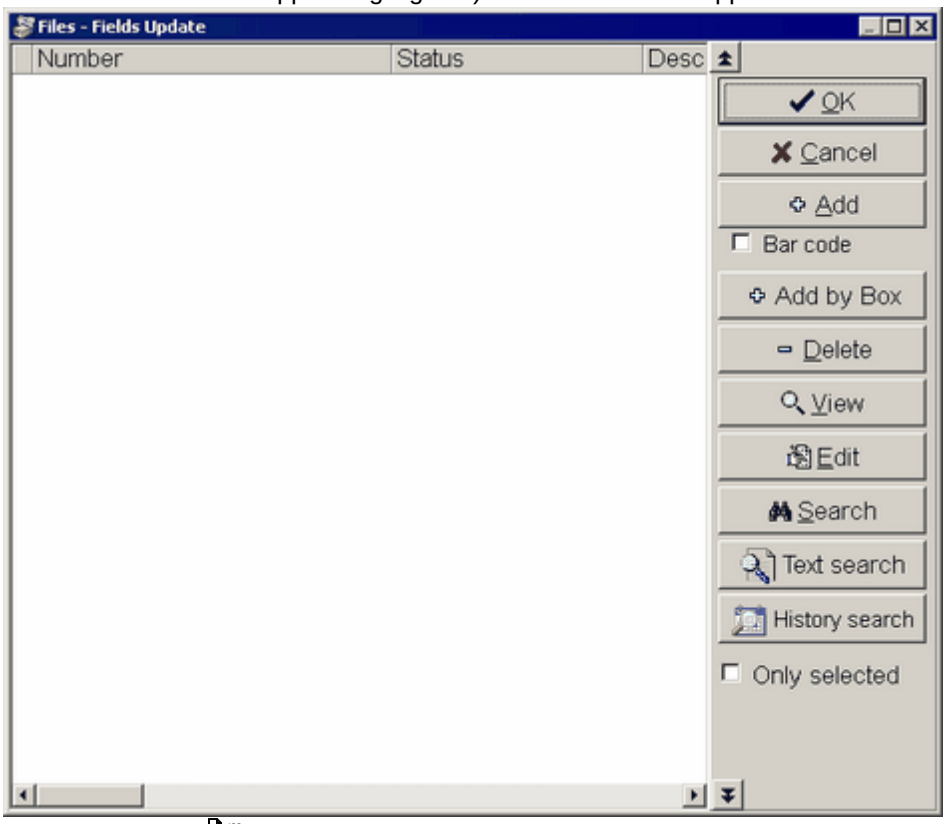


If boxes were permanent and had files that were not, a report will list all such boxes and the percentage of files that are permanent within that box.

9.4.6.8 Updating fields for boxes and files

WARNING ! This operation cannot be undone and needs to be performed carefully and with full knowledge of the risks.

1. Click on **Maintenance->Box and File Maintenance** from the Main window.
2. Click on **Edit->Fields Update->Boxes|Files**. The system prompts for an account.
3. Enter the **customer key**, and press **Enter**, (to have the list of customers press OK -- select a customer and it will appear highlighted). A search window appears.



4. Use the search[492] interface to build a list of the boxes or file to modify. If you perform multiple searches, the results will be added to the list. (See Box and File searches[492])
5. Once you have clicked **OK**.the following window appears for foxes or files respectively:

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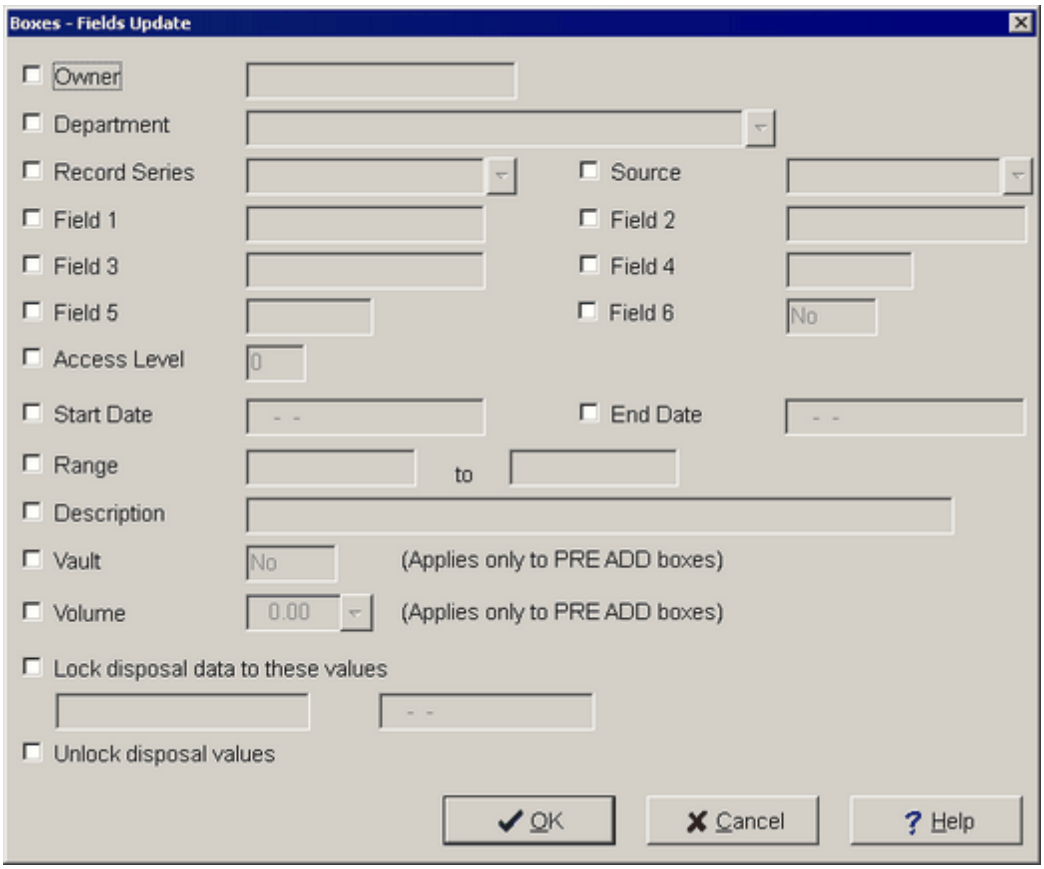
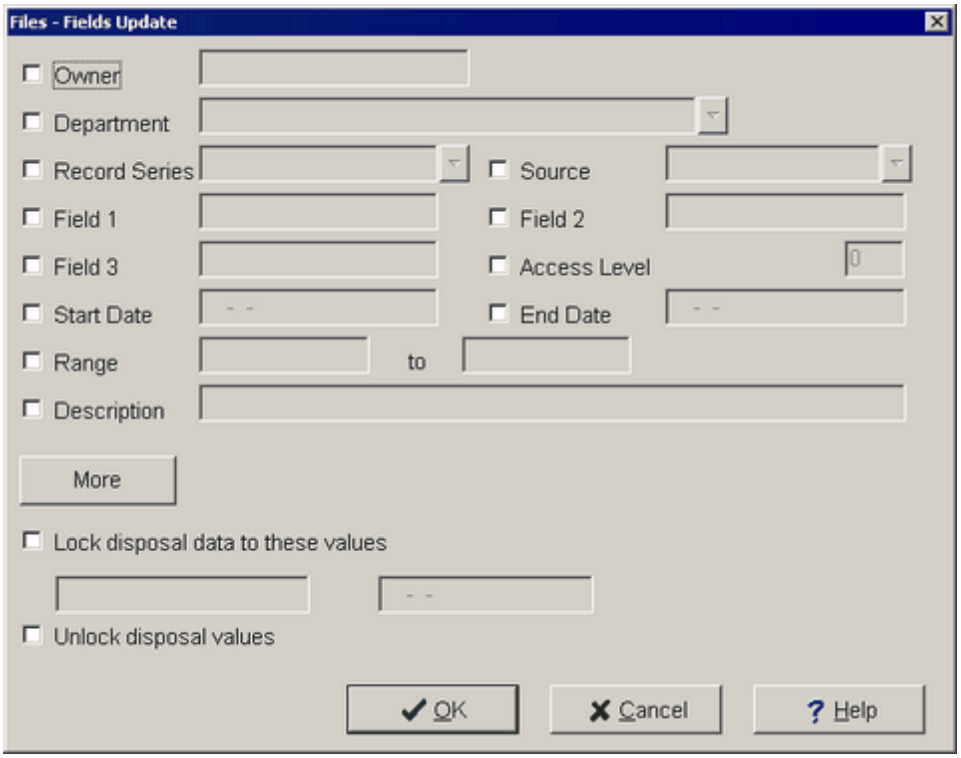


or



Note : For files, clicking the **More** button brings up the extra file fields.

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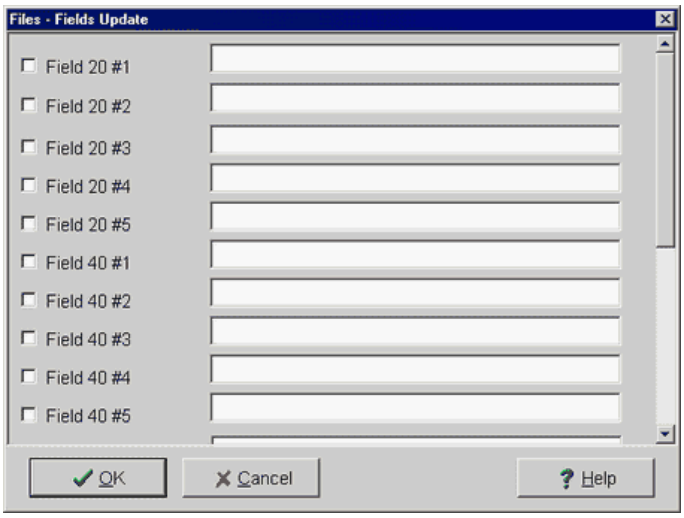


6. Check the desired field(s) to update, and type or select the desired value if appropriate.

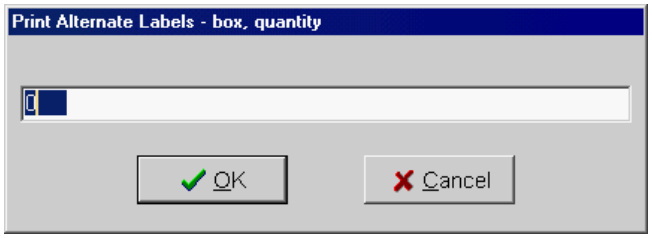
Notes:
1- Selecting Unlock disposal values will cause the disposal dates and methods for the items to recalculate based on the record series.
2- The a record of general change will appear in the history of the selected boxes or files.

9.4.6.9 Printing alternate labels for boxes and files

Note: Use of this option is not recommended.

This function prints thermal labels with sequential numeric bar codes. These can then be affixed to boxes or files as alternate bar codes when returning them with the PDT[175] or when adding it in PRE ADD to the inventory (Box and File modules).

1. Open the **Maintenance->Box and File Maintenance** module and click on **File->Print Alternate Labels ->Box|File**. A window appears.



2. Enter the quantity of labels to print and press **OK**. The labels are automatically printed on the thermal printer attached to the workstation, starting with the number after the last alternate label of this type to be printed.

Note : The bar codes of these labels are generated according to the parameters set for the Alternate Bar Code Lengths[365] field in the System Information module. When many lengths are defined for boxes or files, the system considers the greatest length.

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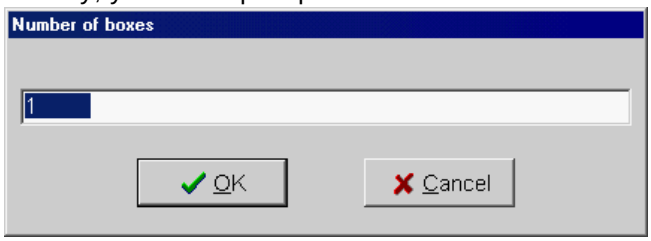
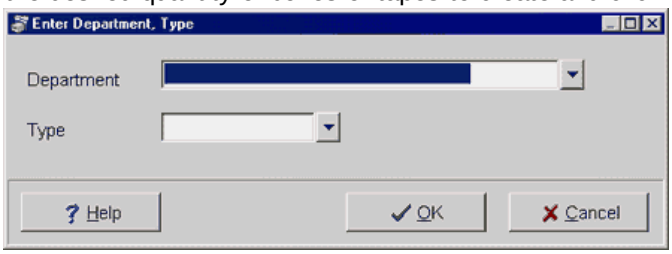
9.4.6.10 Auto-creating boxes or tapes in PRE ADD

This operation will simultaneously print a label and create a record for one or more boxes or tapes in PRE ADD status, permitting customers to label their new tapes and record relevant information in preparation for sending them to the record center. Note that if the customer uses the Active Files module of ActiveWeb, you may wish to create items with the PRINTED status[429] instead, as they may not yet be ready to send these items to the record center.

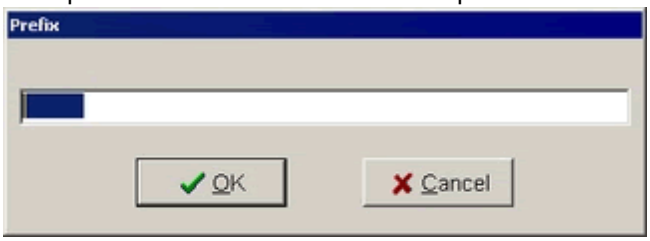
1. From the **Maintenance->Box and File Maintenance** module, select **File->Auto-create PRE ADD Boxes | tapes->Thermal**.
2. Specify the customer by entering the customer key and pressing **Enter**, (if you do not enter a valid customer key, you will be prompted to select the customer from a list).



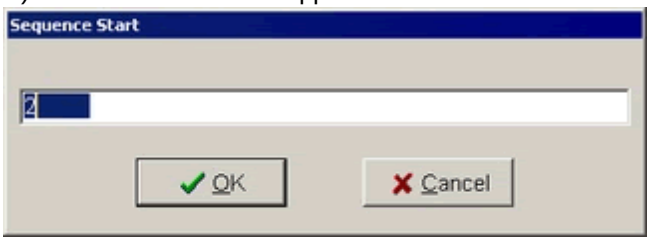
3. Enter the desired quantity of boxes or tapes to create and click on the **OK** button. A window appears.



4. Select a department and a record series and press the **OK** button. A window appears.



5. If the customer requires a prefix on the label, enter one. (the prefix will appear before the auto-created number) Press **OK**. A window appears.



6. The system will default to a number one higher than the previous number used in auto-creating boxes or tapes for this customer. Accept this number or change it if necessary. Press **OK**. A window appears.

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7. Enter the number of copies of labels desired. (typically 1)

8. With a thermal printer, labels are automatically printed. An information box appears and indicates that boxes or tapes have been created. Press **OK**.

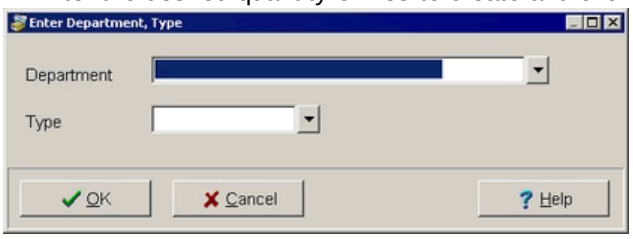
(If you are creating labels using a laser printer, a window appears, prompting you for the position of the first unused label. You may also be prompted to select a label template. Labels are printed soon after on the default laser printer of the system.)

9. The information box appears to indicate that boxes or tapes have been created. Press **OK**.

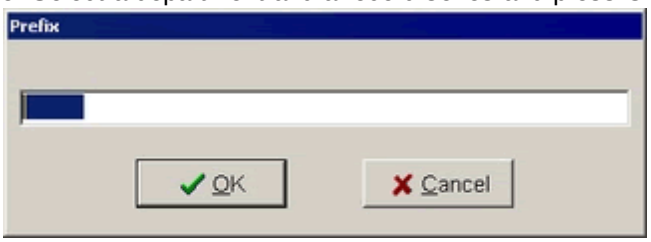
9.4.6.11 Auto-creating files in PRE ADD

This operation is used to create in advance RC numbers for files which do not exist yet. These numbers will appear as PRE ADD in the File module and could be assigned later to real files. In order to identify properly these documents, bar code labels printed here can be affixed on them.

1. Click on **Maintenance->Box and File Maintenance** from the Main window.
2. Click on **File->Auto-Create PRE ADD Files->Thermal|Laser**. A window appears and asks to specify which customer is concerned.
3. Enter the customer key and click on the **OK** button. A window appears.
4. Enter the desired quantity of files to create and click on the **OK** button. A window appears.



5. Select a department and a record series and press **OK**. A window appears.



6. Enter a prefix for the file if desired (the prefix will appear before the auto-created number) and press **OK**. A window appears.

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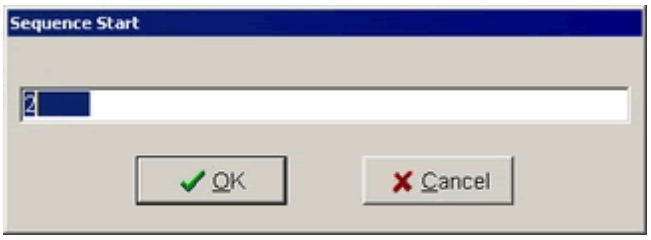
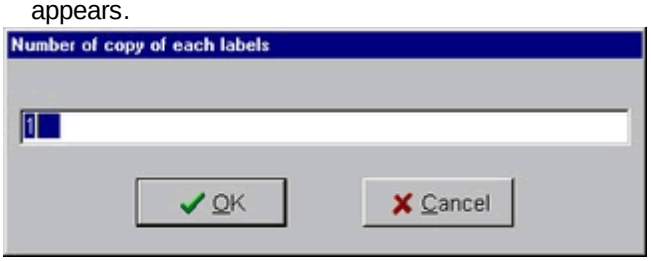
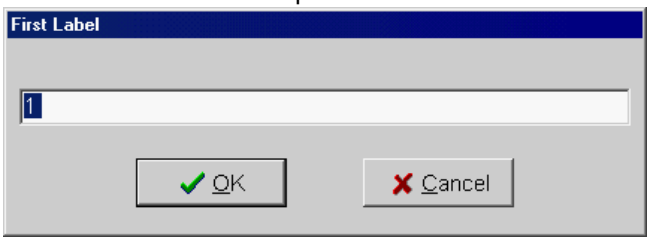


7. Enter a number from which the auto-creation will begin (ex: if you select 4, all the files' numbers will be from 4 and up) and press **OK**. The system automatically adds files in **PRE ADD**, viewable in the File module and containing the department, the type and the number as the only information. A window appears.



8. Enter the number of copies of labels desired. If a laser printer is being used, a window appears.



9. Enter a number to specify the position of the first label on the sheet inserted in the printer and press **OK**.
10. If the customer has more than one label template, a list of these templates appears for you to choose. Select one in the list and press **OK**.
11. Labels are printed soon after on the default printer of the system. An information box appears to indicate the number of files that have been created.

Note : If you exit the operation after the files have been created, the system will start at the number where it left last and it will save the prefix separately for box and file auto creation, to be suggested as default for next time.

9.4.6.12 Auto-creating boxes or files in PRINTED

This operation will simultaneously print a label and create a record for one or more boxes or files with the PRINTED status, permitting customers to label their new items which they might or might not eventually send to the record center. This is used in conjunction with the Active Files module of ActiveWeb.

1. From the **Maintenance->Box and File Maintenance** module, select **File->Auto-create PRE ADD Boxes | tapes->Thermal**.
2. Specify the customer by entering the customer key and pressing **Enter**, (if you do not enter a valid customer key, you will be prompted to select the customer from a list).

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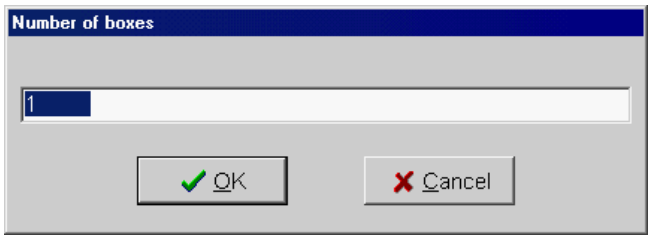
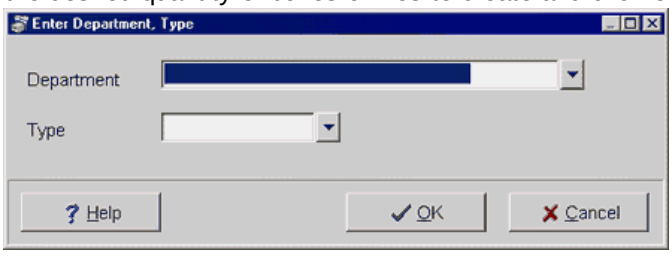


3. Enter the desired quantity of boxes or files to create and click on the **OK** button. A window appears.

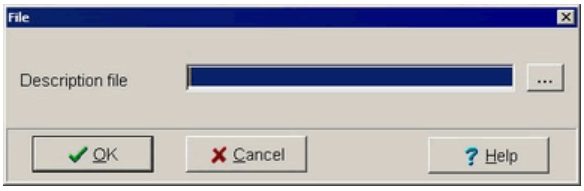


4. Select a department and a record series and press the **OK** button.
5. If the customer has multiple label formats defined, you will be prompted to select the layout to use.
6. The system will prompt you for the **First Label**. If you are printing the labels to a fresh label sheet then leave this at 1. If labels are missing, enter the number of the first label where labels are numbered left to right starting at the top. (For paired label formats, odd numbered labels are on the left, even numbers are on the right.)
7. Click **OK**. The labels will be printed to the laser printer in the specified format. A message will confirm the number of items created.

9.4.6.13 Importing data

Data may be imported into the system. For additional information, see the related chapter (Importing data 779).

1. Click on **Maintenance->Box and File Maintenance** from the Main window.
2. Click on **File->Import data**. A window appears.



3. Browse to the description file 781 by clicking the .button. A window appears.
4. Select the description file and Press **OK**.
5. The file will be imported and the software will automatically give you a preview.

9.4.6.14 Importing data with a wizard

9.4.6.14.1 Importing data with a wizard - principles

1) Data is created in an excel or CSV file (in this case the data will be the information about boxes or files that one imports, it can be the box number, the department, etc.)

2) The wizard enables you to associate values from the data file or set default values for certain fields. Then, certain options can be specified so that the process can be somewhat faster or more specific.

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3) The wizard creates a description file (the role of the description file is to pinpoint where to find the data in the data file, and in which field to put it in EDC RC).

4) A test can be performed by the import wizard to make sure that there are no problems with the description file (this is highly recommended). A report is then issued to help correct mistakes (when the case arises).

5) The importation takes place according to the settings previously chosen and records are added or updated in EDC RC.

See the related topics for more information :
- Step by step procedure 432
- Check List 439

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9.4.6.14.2 Step by step procedure

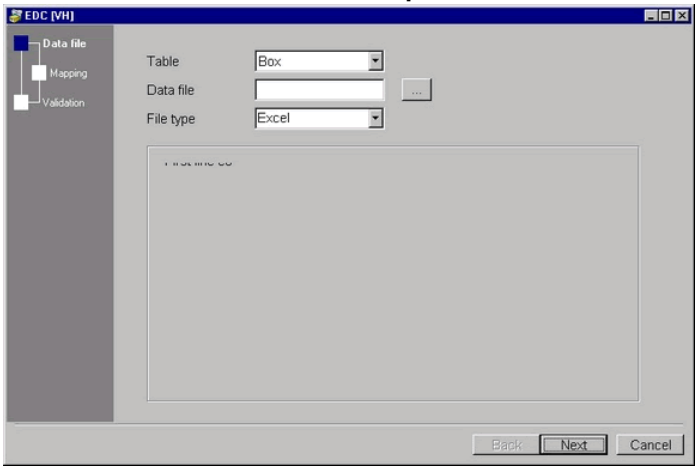
WARNING

This operation cannot be undone. Please ensure that you have valid a valid back-up before performing a large import.
Consider trying your import on a small data set and reviewing it with your customers before running the full import.

This import wizard simplifies the importation of boxes and files into the system. To import any other information, see the Importing Data[779] topic.

To make sure the importation goes smoothly, a check list was created so that you can verify if each step is performed correctly. This check list also mentions specific exceptions, so it is advisable to take a look at it prior to and during the importation (see the Check list[439] topic). Also note that video tutorials are available through DocuData's website.

1. Ope the **Maintenance->Box and File Maintenance** module.
2. From the menu, select **File->Import data with wizard**. A window appears.



3. Fill in the Data file fields:

- **Table** - Drop down list including these choices: Box and File. This indicates what type of item you want to import.
- **Data file** - Click on the browse button to select a file. This file should include all the information you want to import.
- **File type** - Drop down list including these choices: Excel and CSV (A file with Comma Separated Values).
- **First line contains headers** - Check box that must be checked when the first line of the Excel spreadsheet or CSV file contains headers.
- **Separator** - Field that is only visible when the CSV file type is chosen. Use this to specify the character used to separate fields in your data file. (The standard character for the CSV format is the comma, ",")
- **Delimiter** - Field that is only visible when the CSV file type is chosen. The delimiter is used to tell the system to ignore the separator character if it is found within a block of text. For example, if you have a field called Patient Name with a value of "Doe, John", the quotation marks are delimiters telling you that the entire string is to be treated as one field despite the presence of a comma.

4. When the all options have been selected and the data file has been chosen, press on the **Next** button.

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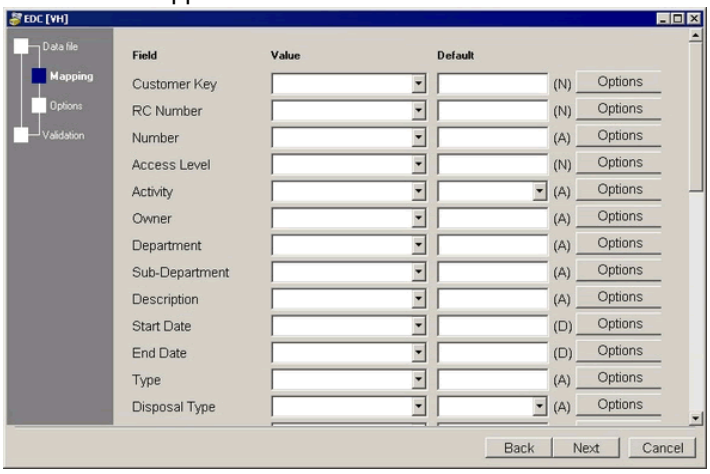
A window appears.



Note: If you checked the First line contains headers check-box during step 2, the names of the columns (either in the excel or the CSV file) will appear in the value drop-down list. If you haven't checked it, the values that were contained on the first line of your file will appear in the list.

5. Fill in the form. For a given Field:
- If values are present in your spreadsheet, select the correct column from the spreadsheet using the drop-down list in the Value column.
- If values are not present in your spreadsheet, type a value to use in the Default column.

Note: Default values are only used in creating new records, and are only used if no column is specified in the Value column. If you wish to update all items to a specific value using an import, then this should be added to your spreadsheet.

Required fields:

For boxes

- Box number
- Customer key
- Activity
- Department name
- Sub-department name
- Type
- Volume
- Location (only when the Activity in IN)

For files

- File number
- Box number or Location (only when the Activity in IN)
- Customer key
- Activity
- Department name
- Sub-department name
- Type

These fields can either be set as default values or a value needs to be selected in the list, otherwise the wizard will give you an error message if one of these fields is missing.

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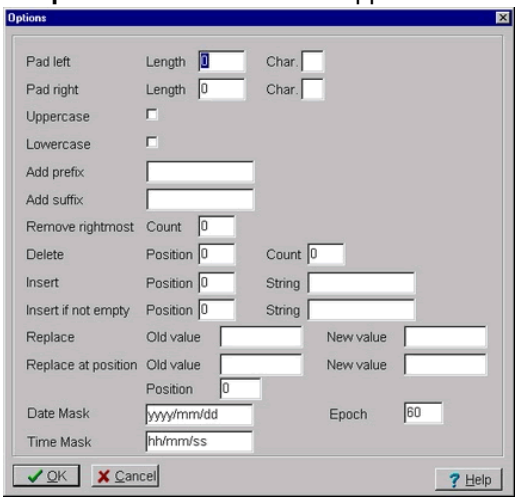
6. For each field specified in the Value column, if you wish to process the incoming data, press on the **Options** button. A window appears.



- **Pad left** - The field's value will be padded to the left with char, for a total length of Length. If Length is smaller than the length of the field value, the field value will not change.
- **Length** - This specifies the length of the value after adding a char.
- **Char** - The character that will appear at the left of the value.

Ex: If a field's value is '6', after a Pad Left operation (with Length = 4 and Char = 0), it will become '0006'

- **Pad right** - Similar to Pad Left, but the padding is added to the right. The field's value will be padded to the right with char, for a total length of Length. If Length is smaller than the length of the field value, the field value will not change.
- **Length** - This specifies the length of the value after adding a char.
- **Char** - The character that will appear at the right of the value.

Ex: If a field's value is '6', after a Pad Left operation (with Length = 4 and Char = 0), it will become '6000'

- **Uppercase** - Boolean field that converts the field's value to upper case letters.

Ex: If a field's value is 'Hello!', after Uppercase, it will become 'HELLO!'

- **Lowercase** - Boolean field that converts the field's value to lower case letters.

Ex: If a field's value is 'Hello!', after Lowercase, it will become 'hello!'

- **Add prefix** - The value specified in this field will be added at the beginning of the field's value.

Ex: If a field's value is 'Smith', and 'Dr.' is added as a prefix, it will become 'Dr. Smith'

- **Add suffix** - The value specified in this field will be added at the end of the field's value.

Ex: If a field's value is 'Dr. Smith', and ' Jr.' is added as a suffix, it will become 'Dr. Smith Jr.'

- **Remove rightmost** - The 'count' characters will be deleted from the right side of the field's value.
- **Count** - This specifies the number of characters to remove from the right.

Ex: If a field's value is 'Hi there', and the count value is 6, it will become 'Hi'.

- **Delete** - The amount of characters specified in the Count field will be deleted from the field's value starting from the value specified in the Position (where the first character is considered at position 1.)
- **Position** - This specifies where the deletion starts.
- **Count** - This specifies the number of characters to delete.

Ex: If a field's value is 'IceCreamEater', and a delete modification is done (Position =4 and Count= 5), it will become 'IceEater'.

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- **Insert** - The value of String will be inserted in the field's value before the position indicated by Position (where the first character is considered at position 1.)
- **Position** - This specifies where the values specified in the String field will be inserted.
- **String** - This specifies the values inserted.

Ex: If a field's values are 'Fruits juice', after the modification (Position = 7 and String = '& Cream'), it will become 'Fruits & Cream juice'.

- **Insert if not empty** - This option has the same behavior as the insert conversion except it will only insert the specified character string if the imported data is not empty. If the imported data is only "spaces" it will be considered as empty. See the example for Insert.
- **Position** - This specifies where the values specified in the String field will be inserted.
- **String** - This specifies the values inserted.

- **Replace** - If the field's value is the same as the one specified in the Old value field, it will be replaced by the value of the New value field. If one of the field values contains a comma (,) character, then it needs to be enclosed in brackets ("").
- **Old value** - This is the old value that the system will look for and replace with the new value.
- **New value** - This is the new value that will replace the old value.

Ex: If the field's value is 'IN', after doing a Replace (Old value = IN and New value = Received), it becomes 'Received'.

- **Replace at position** - This is the same thing as Replace, but the behavior is to replace the specified string only if it is present at the indicated position.
- **Old value** - This is the old value that the system will look for and replace with the new value.
- **New value** - This is the new value that will replace the old value.
- **Position** - This is the position where the Old value is supposed to be found in order to be replaced.

Ex: If a field value is 'ExampleOne' and another one is 'OneExample' and the Replace at position is performed with these settings: Old value = One, New value = Two, Position = 1. The field value 'ExampleOne' will remain the same, but 'OneExample' will changes to 'TwoExample'.

- **Date mask** - This specifies the structure of the different dates in the data file. If a year is represented by two digits then an epoch must also be specified.

Ex: yyyy/mm/dd

- **Epoch** - This specifies a two digit integer used to determine a date prefix, so that all two digits dates below the epoch value will be assigned a prefix 20, and all two digit dates above the epoch value will be assigned a prefix 19.

Ex: If the Epoch is set to 80 and the Date is set to 04/05/05, then the software will put 2004/05/05 for the date when doing the importation. The default value is the value from the Management->System Information module.

- **Time mask** - This specifies the structure of the time in the data file.

Ex: hh/mm/ss

7. When all the fields have had a value or a column name assigned and all the options have been set, press on the **Next** button. A window appears.

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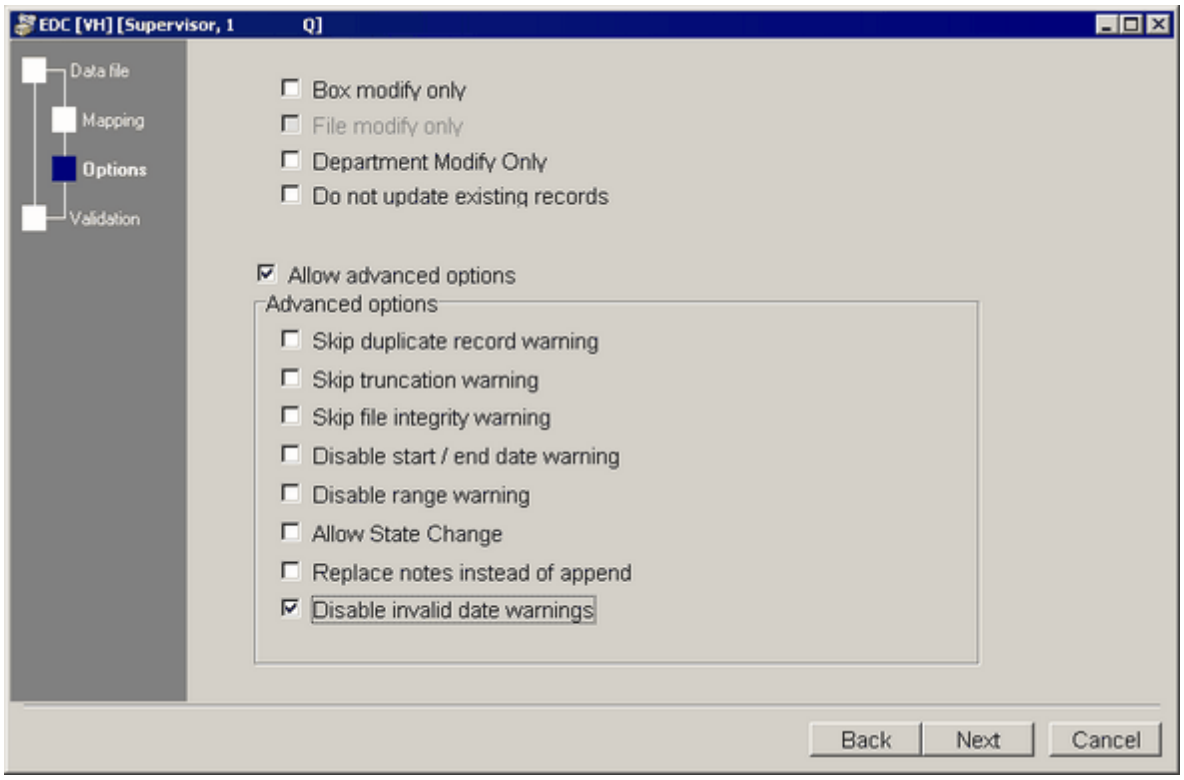

- **Box modify only** - Check box that prevents the addition of new boxes, only the update of the boxes' information already present in EDC will be done. This means that if a box contained in the data file is not already present in the software, the test and the final import will give an error message (ex: Box XYZ for customer DEMO not found, it can't be updated.)
- **File modify only** - Check box that prevents the addition of new files, only the update of the files' information already present in EDC will be done. This means that if a file contained in the data file is not already present in the software, the test and the final import will give an error message (ex: File XYZ for customer DEMO not found, it can't be updated.)
- **Department modify only** - Check box that prevents the addition of new departments, only already created departments should be included in the data file. This means that if a department contained in the data file is not already present in the software, the test and the final import will give an error message (ex: Department XYZ not found.)
- Do not update existing records - Check box that prevents existing records from being updated. This is useful if all items in the import should be new.
- Allow advanced options - Check box that enables the use of the advanced options.

Advanced options

- **Skip duplicate record warning** - When this check-box is checked, the duplicate record warning will not be included in the error report. This verification is done to prevent the addition of duplicate records in EDC for the same customer.
- **Skip truncation warning** - When this check-box is checked, the truncation warning will not be included in the error report. Normally the truncation message simply indicates that the data imported was too big for the field. The truncated information is simply added to the field and the complete information is included in the notes.
- **Skip file integrity warning** - When this check-box is checked, warnings about differences in the disposal conditions specified for the boxes and the files that contain them will not be included in the import log.
- **Disable start / end date warning** - When this check-box is checked, the start / end date

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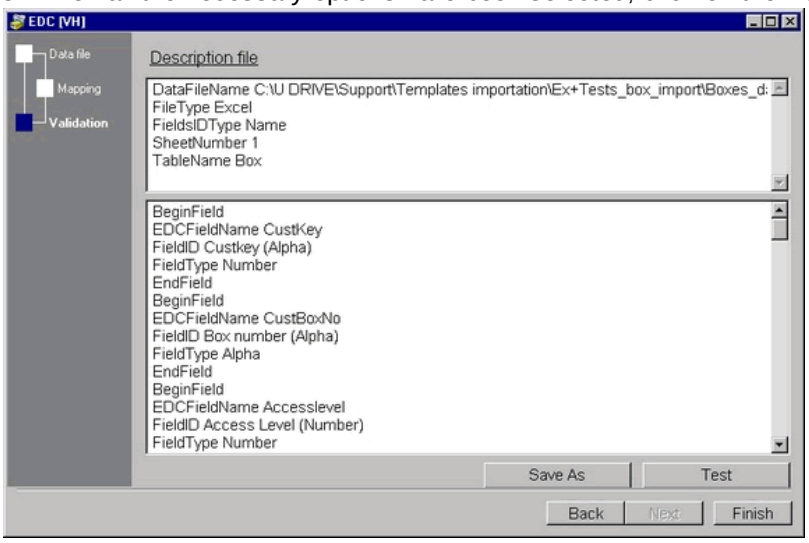
warning will not be included in the error report. This verification is normally used to make sure the start date is before the end date.

- **Disable range warning** - When this check-box is checked, the range warning will not be included in the error report. This verification is normally used to make sure that the range interval is valid. A valid range is sequential, meaning that the first value (whether it be a letter or a number) is supposed to be before the second value in the sequence. Ex: A comes before Z, thus the range A124 to Z129 would be sequential while the range Z009 to A129 would not.
- **Allow State change** - When this check-box is checked, the software allows the update of the box or the file's activity, this should be done in exceptional situations. This verification is done so that the state of an item cannot be changed by importing a new activity.
- **Replace notes instead of append** - The default behavior is to add data imported to notes fields to the end of existing notes. If this check box is selected, existing notes will be overwritten.
- **Disable invalid date warnings** - When importing customer box and file data, a warning is logged if dates are greater than 3999/12/31. For large imports where this is expected, select this option to suppress these warnings.

8. When all the necessary options have been selected, click on the Next button. A window appears.



9. **Test** - The system will test the description file that has been created (according to the settings of the two previous windows). A report will appear, mentioning if the file contains any errors.

10. Save as - The system will prompt you to save the description file that has just been created.
11. Click the **Test** button to make that the settings of the importation are correct. The import log of the test appears

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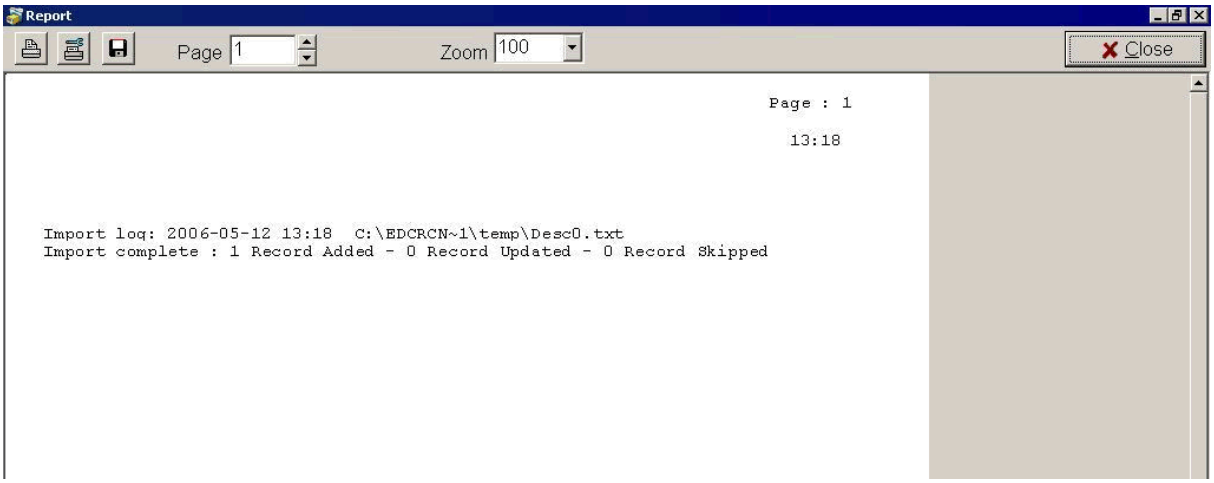

Note: The test verifies only the first record of the data file, that is why the test report will only mention "1 record added/updated/skipped".

When reading the import log after a test or after the update, if a word or an expression is unfamiliar, please check the list of terms below for clarifications :

- CustBoxNo - Box Number
- CustFileNo - File number
- FileOwner - File owner
- BoxOwner - Box owner
- MainDeptName - Department
- SubDeptName - Sub department
- BarCode - Alternate label
- Description - Description
- StartDate - Start Date
- DocType - Type
- UserField1- Field1
- UserField2 - Field2
- UserField3 - Field3
- UserField4 - Field4
- UserField5 - Field5
- UserField6 - Field6
- DestType - Disposal type
- DestDate - Disposal date
- RangeFrom - Range
- RangeTo - Range
- EntryDate - Entry Date
- Volume - Volume
- InVault - Vault
- Activity - State
- BoxDDNo - Box RC number
- EndDate - End Date
- SourceLoc - Source
- Accesslevel - Access level
- OldCustBoxNo - Old box number
- OldCustFileNo - Old file number
- Location - Location
- Notes1- Notes

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- Notes2 - Secondary notes

12. When the testing and the mistake correction are complete, press on the Finish button. A confirmation message appears, press Yes if you want to continue. The system will then prompt you to give your password for confirmation. Enter your password and press OK.
13. The importation and/or update of the boxes or files will automatically be done.

9.4.6.14.3 Check List

This check list will help you make sure that you haven't forgotten anything important during your data importation. Please refer to the previous topic for a detailed step by step procedure[432].

Before the importation
☐Take note that the disposal type and the disposal date cannot be imported via the import wizard, this will be available in a future version. This information can be imported via the more complex data importation[779].
☐Make sure that all the values for the Access Level field range from 0 to 9.
☐Make sure that the Entry Date field is not blank in the file, since the current date will be entered as default in the field.

**When importing or updating files :

☐Make sure that the state of the file corresponds to the state of the box it is imported in (ex: a file should not have the IN state if the box is in the PRE ADD state.)

During the importation
DATA FILE

☐Make sure that you have chosen the right data file
☐Make sure that you have entered the delimiter and the separator in the field (only if you are using CSV files). If this is not done, the entire line will appear in your drop-down list.

MAPPING

☐Make sure the required fields are in the data file (excel or CSV) or that a default value is entered or selected
☐Make sure all the values are associated to the correct fields
☐Make sure all the modifications that are specified in the Options are correct.

☐Make sure that the following fields are not put as default :

Box Number (should only be used when doing File import, for files that will go in the same box)
(Box) RC number (should only be used when doing File import, for files that will go in the same box)
(Box)Old number
File Number
(File) RC Number
(File)Old number
Start Date
End Date
Entry Date
Bar code
Notes 1

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Notes 2

When updating existing boxes :
☐Understand that if default values are selected or entered, the software will not update the existing information in this/these field(s).
☐When updating boxes in the IN state, still leave PreAdd as the default status. The status of existing boxes will not be modified.

OPTIONS

When updating existing boxes :
☐Make sure that either the box modify only and/or the department modify only check-box are selected in the options.

When updating existing files :
☐Make sure that either the file modify only and/or the department modify only check-box are selected in the options.

VALIDATION

☐In the description file, when the Customer Key is taken from the data file :
☐Test the description file that was created.
☐Verify the report created and change the necessary information (when the case arises).
☐Test the description again (if there were errors to correct.)

WARNING

This operation cannot be undone. Performing a back up of the database is highly recommended before going any further. This should be done in case boxes or files are added by mistake, or if the import is done to modify the information of many boxes or files.

It is always recommended to do an import of one or few entries, before performing the actual import. This is done to make sure that mistakes in the Excel or CSV sheets can be caught before the actual import occurs.

9.4.6.15 Importing images

This is used when many images need to be imported at the same time.

1. Create one or many folders named after the bar codes of the files you want to import images in. Example: one wants to import images for files A61 (bar code: 2 109 1223) and B62 (bar code: 2 109 1225) ; the folder for file A61 will be called "2 109 1223" while the folder for file B62 will be called "2 109 1225".
2. Put all the images you want to import in the appropriate folders. If you need to import many files at a time create a repertory where all the folders will be and select that repertory when it is time to import.

Note : One can only import images in files that are IN or PRE ADD. Not all image formats can be imported into EDC; the accepted formats are: .pdf, .tiff, .tif, or .dcx for multi page formats and

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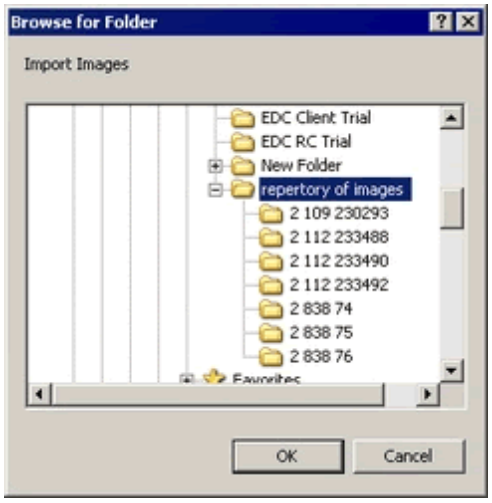
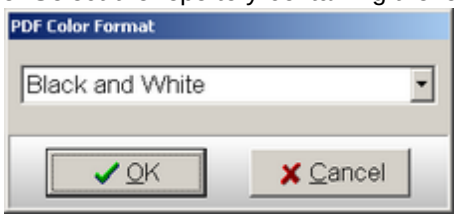
.bmp, .pcx, .png, .jpg for single page formats. The name of the images does not have to be specific.

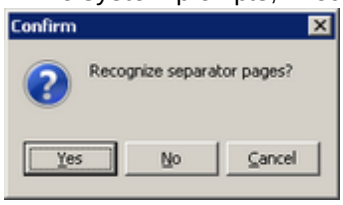
3. Click on **Maintenance->Box and File Maintenance** from the Main window.
4. Click on **File->Import Images**. A window appears (the window is specific to your computer.)



5. Select the repertory containing the folder(s) and press **OK**. A window appears.



6. Select the color format to use for any PDF images documents. Then Click **OK**. (Images imported in color are larger).
7. The system prompts, "Recognize separator pages"?



- If the document has EDC image separator pages inserted between sections, click **Yes**, otherwise click **No**.

8. The images will be imported in the software and an error log will appear if any errors have occurred. The images will be imported in alphabetical or numerical order. The extension ".imported" will be added to images that have been imported to prevent duplication.
9. Repeat the operation if needed.

Note: See knowledge base article KB00145 at client.docudatasoft.com for instructions on using imaging separator pages to scan batches of documents more efficiently using Imaging Separator Pages 466.

9.4.6.16 Moving items between regular storage and vault

Customers pay a premium for the storage of their most sensitive material in the vault. Therefore, EDC enforces the storage of boxes and tapes in the type of location that they were marked for. However, sometimes it may be necessary to transfer items into or out of vault storage.

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1. Move the boxes or tapes to the new location using the PDT[766].
2. Upload the move list to the **Maintenance->Box and File Maintenance** module, **File->Upload Vault Transfer Move List** menu option.

9.4.6.17 Upload resize move list

This function allows you to change the size of a previously sized box by moving it to a location of the correct size.

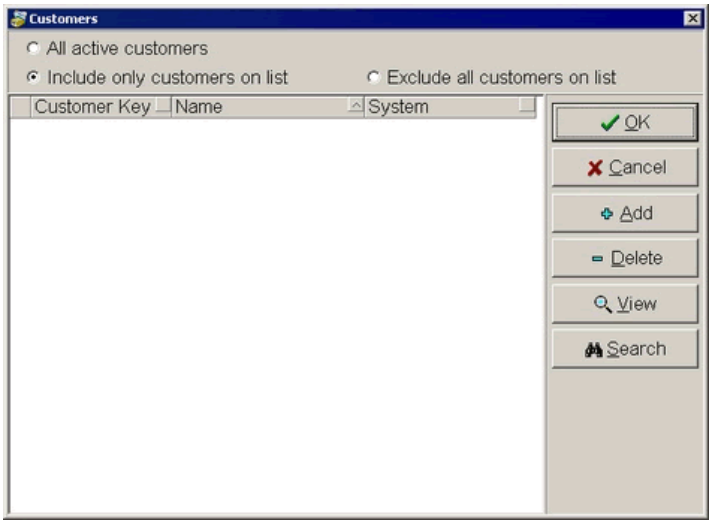
In order to change the size of a box,

1. Perform a move on the PDT[766] to a location of the correct size.
2. Open the **Maintenance->Box and File Maintenance** module.
3. From the menu, select **File->Upload resize move list**.
4. Upload the move list by selecting **2**-Send results->**3**-Move. on the PDT.
5. When the data transfer is done, any errors are displayed. The history and location of the items are automatically updated.

9.4.6.18 Indexing customers

This is used to index the boxes and files of one or many customers at a time, in order for the information about the boxes and files to be available in the Full Text Search module. This operation may take a lot of time and may slow down EDC, especially when indexing many customers at a time, so it might be a good idea to perform it during a period of the day that is less active.

1 Click on **Maintenance**->**Box and File Maintenance** from the Main window.
2 Click on **File**-> **Index customers.** A window appears.



3 To index all your customers, check off the **All active customers** field and press **OK**.
4 To edit the list of customers:

- To add customers to the list, click on the **Add** button. Enter the customer code or press **OK** to have the list of customers (select a customer, it will appear highlighted, and press **OK**.)
- To delete customers from the list, select the desired customer(s) and press on the **Delete** button.
- To view the information of a customer, select the desired customer and press on the **View** button.

- To search for a customer, press on the **Search** button. A window appears

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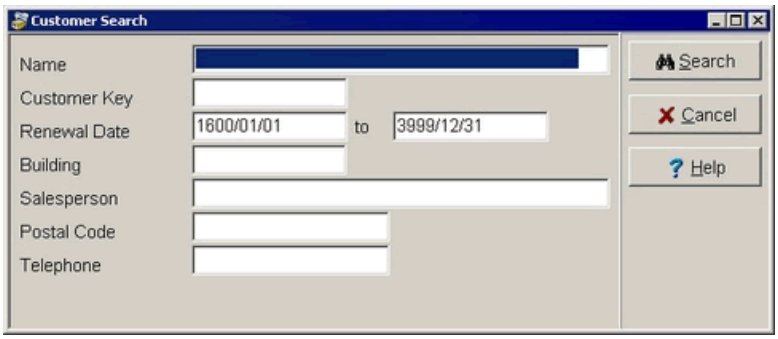


Enter the different search criteria and press on the **Search** button. All the customers that correspond to the entered criteria will automatically appear on the list.

5 To index only the customers on the list, check off the **Include only customers on list** field and press **OK**.
6 To index only the customers on the list, check off the **Exclude only customers on list** field and press **OK**.

9.4.6.19 Viewing the replication log

1. Click on **Maintenance->Box and File Maintenance** from the Main window.
2. Click on **File->Replication log**
3. The report will automatically be displayed on the screen

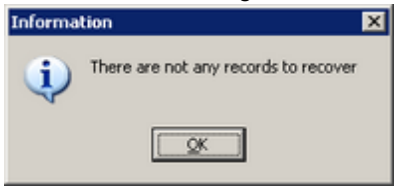
9.4.6.20 Viewing the replication times

1. Click on **Maintenance->Box and File Maintenance** from the Main window.
2. Click on **File->Replication Times**
3. The report will automatically be displayed on the screen

9.4.6.21 Recover boxes or files from backup

Although precautions are taken to prevent it, problems such as hardware failure, network problems, or viruses may cause file data to become corrupt. This operation allows you to recover file data from a back-up of your EDC database, without losing all the work that was done (such as the processing of new orders) since the back-up.

1. From the **Maintenance->Box and File Maintenance** module, select **Edit->Recover boxes|files from back-up**.
2. In the window that appears, browse to the Folder.Dat file of the back-up for files or Box.Dat for boxes. (This may be in a folder such as EDCRC\data\)
3. Select it and click **Open**.
4. EDC will compare the existing files to the back-up and recover any files that have become corrupt. If no files have changed, the following message will appear:



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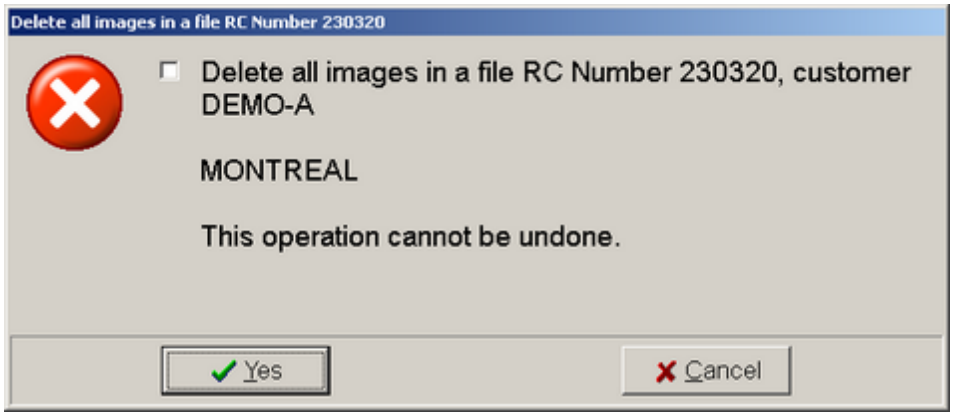
9.4.6.22 Deleting all images in a file

Once saved, images become permanent until the associated file is destroyed. If it is necessary to delete all images for a file, it may be done as follows.

(If it is necessary to keep some of the images from a file, these can be exported **prior to deletion**, then re-imported.)

1. Open the **Maintenance->Box and File Maintenance** module.
2. From the menu, select **Edit->Delete all images in a file**.
3. A message "Delete all images in a file ? This operation cannot be undone." appears. Click **Yes** to proceed.
4. A "Customer" prompt appears. Enter the **customer key** and click **OK**, or click OK and select the customer from a list.
5. A "File RC" prompt appears. Enter the RC Number[871] of the file and click **OK**. A warning appears.


Delete all images in a file RC Number 230320
Delete all images in a file RC Number 230320, customer DEMO-A
MONTREAL
This operation cannot be undone.
Yes
Cancel

6. Confirm that the file RC Number, the customer, and the file name are all correct. If they are, **check the check-box** and click to proceed.
7. A "Password" prompt appears. Enter your password and click "**OK**".

The images will be permanently deleted, and the history item "ALL IMAGES DELETE", with the user who deleted them, will appear in the file history.

Note: If the customer uses ActiveFile and has their data replicated, this operation can only be performed by a supervisor user through the ActiveFile software.

9.5 Inventory Management (Inventory tab)

9.5.1 Outline (inventory)

The inventory management is the main reason for the existence of a record center. That is why the record center must insure a high degree of reliability and a lot of flexibility regarding all the operations related to inventory management. EDC software was conceived to perform many operations on boxes and files in order to strictly control and manage the inventory. These operations are performed from the modules located under the Inventory tab.

Here is a list of the main operations performed on the inventory :

- Editing the inventory[445] of boxes and files
- Performing searches[485] on boxes and files

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- Producing activity reports[531] on boxes and files
- Editing internal notes[579] for documents
- Scanning documents[474] and managing scanned images
- Managing storage spaces[513] of boxes and files
- Managing the storage spaces on shelves[524] for files
- Managing shredding container[580] use
- Producing disposal lists[536]
- Producing transfer lists[552]
- Producing internal transfer lists[571]
- Producing deletion lists[565]
- Managing the schedules of tapes[493]
- Performing Full Text Searches[497] on boxes and files
- Importing and editing customized reports[501]

Note : Most of the operations related to the inventory (and also the order processing) are performed with a PDT. The different functionalities of the PDT are detailed in the chapter How to use the PDT[762].

9.5.2 Box and File

9.5.2.1 Overview (Box and File)

The Box and the File modules are documented together, because of extensive similarities in the functions available for managing these two levels of records. These modules enable you to manage and consult information related to boxes and files, perform various functions, and generate many reports.

Available reports (Box module)

- list of all boxes, either by number or location
  - o list of boxes for one customer only
  - o by number, by old box number, by description, by owner, by field 1, by field 2, by field 3, by RC location, by entry date, by department or by sub-department
- on department, on sub-department, on activity, on type for a sub-department, on type for a department or on type for all boxes
- list of all boxes that are out for one customer
- inventory completed for one customer
- inventory not completed for one customer
- detailed information of a box

Available reports (File module)

- list of files for one customer only
  - o by number, by description, by owner, by field 1, by field 2, by field 3, by entry date, by disposal date, by department, by sub-department or by shelf
  - o on department, on sub-department, on activity, on box, on type for a sub-department, on type for a department or on type for all files
- list of files that are out for one customer
- detailed information of a file

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Tasks

- Using alternate bar codes to add items and edit them 452
- Finding a box or a file 455
- Editing information related to a box or a file 457
- Viewing the items of an item set 463
- Editing the report options for inventory lists 470
- Viewing or printing the list of all boxes or files 472
- Viewing or printing the list of boxes or files that are out 472

Fields 448 (see the next section)

Distinctive menu options:

File menu
- Set Report Options 470
- Print Thermal Labels 465
- Print Laser Labels 465
- Printing Labels by Location 465 (applies to Box module)
- Print Box | File Details 473
- Print Imaging Separator images 466 (applies to File module)
- *** Print inter-file label
- Batch Indexing 468
- Images 474 (applies to File module)

View menu
- Files (applies to box module) Viewing files within a box 464
- History Viewing history related to a box or a file 471
- Notes Viewing or editing notes associated to a box or a file 461
- Secondary Notes Viewing or editing the secondary notes of an item 462
- Keywords Viewing and adding keywords 473
- Internal Notes Viewing the internal notes of an item 461
- Alternate Label Viewing or editing the alternate label of a box 474
- Last Order Viewing the last orders of a box or file 474

Find menu
- Find With Bar Code
- Quick Find

Edit menu
- Add PRE ADD 452
- Add PRE ADD Shelf (applies to file module) 452
- Delete PRE ADD Deleting a PRE ADD box 456 / Deleting a PRE ADD file 457
- Notes Viewing or editing notes associated to a box or a file 461
- Secondary Notes Viewing or editing the secondary notes of an item 462
- Alternate Label Viewing or editing the alternate label of a box 474
- Extra Key Words Viewing and adding keywords 473
- Copy and Add Copying and adding a box or file 458
- Change of hands Performing a change of hand for documents that are out 458
- Batch Addition/Edition Batch adding files to the inventory 453
- Transfer to PRE ADD Transferring a file to PRE ADD 459
- Transfer shelf files to box (applies to file module) Transferring an open shelf file into a box 460
- Transfer from box to shelf (applies to file module) Transferring a file from a box to an open shelf 460

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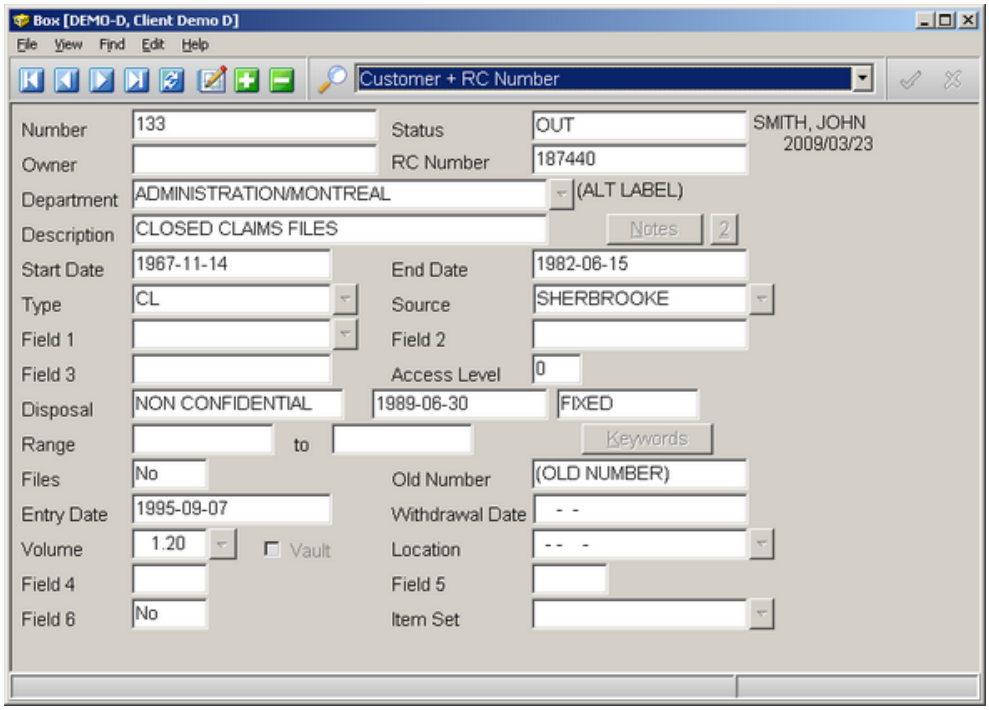
- Set master content password (applies to file module) Password protecting an image for the web[484]
- Change box cardboard (applies to box module) Changing the cardboard of a box[458]

Box module window



File module window

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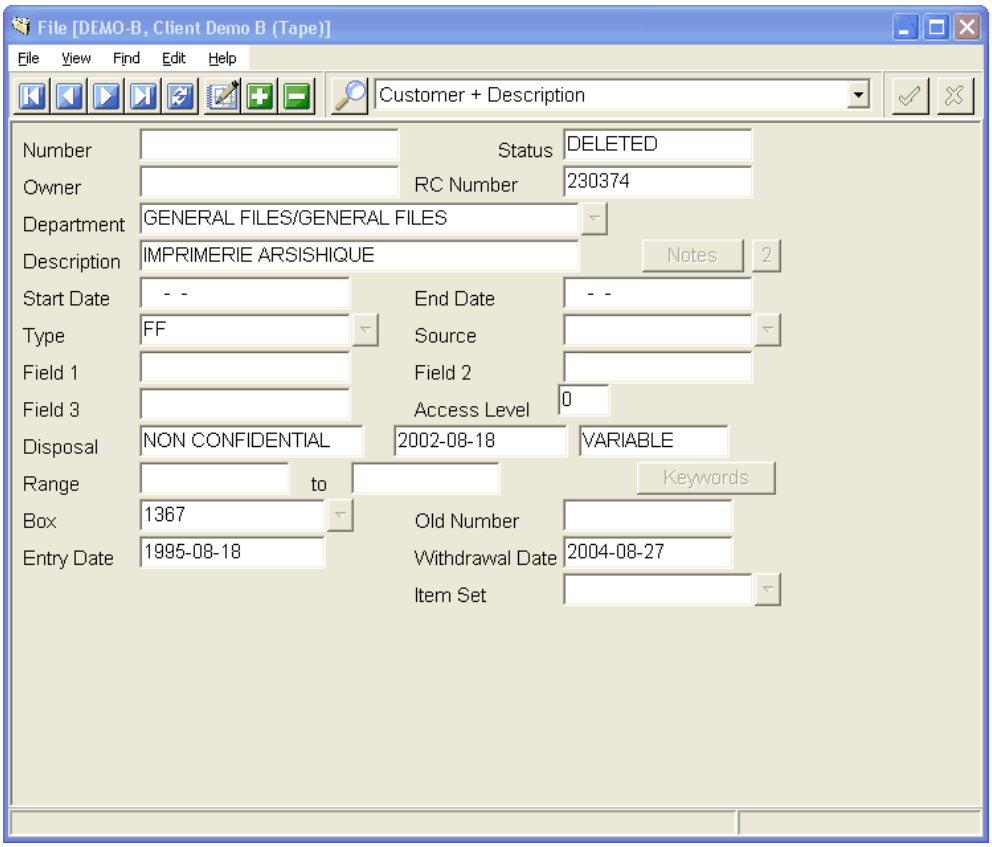

9.5.2.2 Fields (Box and File)

Number
Required alphanumeric field containing a maximum of 20 alphanumeric characters.
This field contains the number assigned to the box or the file. The following values are all valid : 100, 100-01-01, TB-00002. To get them sorted numerically (example: 000001, 000002, 000133, ...), it is necessary to right-string numbers with "0"s.

Note : This field is optional for the File module.

Status
Read-only field that can take values "PRE ADD", "IN", "SELECTED", "OUT", "TO DESTROY", "DESTROYED", "TO TRANSFER", "TRANSFERRED", "TO DELETE", "DELETED".
This field indicates the current state (activity can also be used) of a box or a file. This field is automatically updated to reflect the operations made on boxes or files.

(If the state of the item is OUT, the recipient and the date they received the item are displayed.)

Owner
Optional alphanumeric field containing a maximum of 20 characters.
This field indicates to whom the box or the file belongs and is strictly for customer use.

RC Number
Unique read-only numeric field.
This field indicates the number automatically attributed to a box or a file. It is used internally by the system for tracking purposes.

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Department
Required drop-down alphanumeric field containing a maximum of 30 characters.
This field indicates to which department and sub-department a box or file belongs to. For example, CLAIMS/CLOSED CLAIMS indicates that the box is in the CLOSED CLAIMS sub-department of the CLAIMS department.

Note : Departments and sub-departments are defined by the Department 322 module.
If the customer's conservation policy uses departmental retention, the disposal dates will be determined from the retention associated with the sub-departments. The conservation policy is defined in the Retention field 248 of the Customer Information module.

(Alternate Label)
The alternate label appears at the right of the department (when applicable).

Description
Optional alphanumeric field containing a maximum of 40 characters.
This field contains the description of the document.

Notes
Optional alphanumeric field containing a maximum of 65 pages of characters (approximate quantity).
To edit this field, use the **Edit**->**Notes** access path (or click on the **Notes** button in the edit mode).

Start Date/End Date
Optional fields with a predefined date format that can be modified (see the Date Mask field in the System Information module).
These fields are used to specify the start and the end dates of a box or a file. These fields are useful when the content of a box or a file has been assigned to a specific period of time. The disposal date will be calculated by adding the conservation period to the end date (when it is present).

Record series
Required drop-down alphanumeric field containing a maximum of 10 characters.
This field describes the record series of the retention schedule by which a box or a file is controlled. Its value can be edited the same way as the Department field.

Note : The record series are defined in the Retention Schedule 315 module.
If the customer's conservation policy uses record series retentions, the disposal date will be determined from the retention associated with the document type.

Source
Optional alphanumeric drop-down field containing a maximum of 10 characters (can be dissociated with the drop-down list for the File module).
For boxes, this field indicates the location where the box came from before arriving at the off-site record center. For files, this field is reserved for the internal use of the customer and any information can be entered here.

Note : The source locations are defined in the Source Location 328 module.

Field 1, Field 2, Field 3
Optional alphanumeric fields containing a maximum of 20 characters each.
The content of these fields can also be defined in the Customer Information module (see Defining the box and file fields 284).
These fields are for internal use and can be renamed in the Dictionary 359 module. These fields are

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commonly renamed per customer. It is possible to assign a drop-down list of possible values that will also apply to the web. For more details, see Defining the box and file fields[284]

Access Level
Numeric field containing a value between "0" and "9" inclusively.
The access level is used to prevent unauthorized users from editing or ordering boxes with access restriction ("9" is the most restrictive access). When editing the field, the user can only assign a value less than or equal to his own level. If the access level of a user is less than the box's access level, the user is not allowed to edit or order it.

Disposal
There are three fields related to disposal :

A first choice field containing the values "CONFIDENTIAL[866]", "NON-CONFIDENTIAL[866] ", "NONE[866] ", "PERMANENT[866] ", "REVISION[866]", "SAMPLE[866]" or "SEND TO DEPOT[866] ". This sub-field indicates the disposal mode used for the concerned record series.

A second sub-field indicating a disposal date for which the format is defined in the System Information[364] module.
The box or file will be reviewed on the disposal date. If the disposal is set to "VARIABLE" in the next field, then the disposal date of a document corresponds to the conservation period added to the End Date (when present) or to the Entry Date;

A third choice field containing the values "FIXED" or "VARIABLE".
If "FIXED" is selected, the disposal date will not be controlled by the customer's conservation policy, but will be the one entered manually in the field. When this field is set to "VARIABLE", the revision date will be calculated from either the department's or the document type's retention, depending on the customer's conservation policy. By setting this field to "VARIABLE", any updates to a department or a document type's retention will automatically adjust the disposal date of all the related boxes and files.

Range
Fields possessing a mask defined in the Interval Mask field of the Customer Information module.
Interval of documents contained in a box or a file. This field is reserved for the internal use of the customer.

Files (Box **module only)**
Read-only field that can contain "Yes" or "No".
When this field indicates "Yes", it means that the box contains inventoried files.

Box (File **module only)**
Required drop-down field associated to the list of boxes in inventory. This field appears only for files added in a box
Indicates the box where the file is stored. The box number must correspond to a IN or PRE ADD box when adding files in PRE ADD.

Note : The current module may not be used to transfer a file into a new box. The regular procedure is performed in the Delivery Return module and allows to control that a file is properly inserted in the right box.

Shelf (File **module only)**
Read-only field associated to a list defined in the Open Shelf Location[524] module. This field appears only for files added on an open shelf.
This field indicates the shelf where the file is stored and is temporarily active and modifiable when the file

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becomes IN and still do not have a granted shelf.

Note : The current module may not be used to grant a shelf to a file. The regular procedure is performed in the Delivery Return module and allows to control that a file is put on the right shelf.

Old Number
Read-only alphanumeric field containing a maximum of 16 characters.
When a box or file number is modified, the old number will be displayed in this field for reference purposes. If the number is changed a second time, then the original number will not be retrievable, at least for searches by old numbers. Effectively, all the old numbers of a document are saved in the document history.

Entry Date
Read-only field with a date mask that can be modified in the System Information module.
This field indicates the first date when a box or file was put to PRE ADD in inventory and will indicate later the arrival date of the document at the record center (date when the document became IN).

Withdrawal Date
Read-only field with a date mask that can be modified in the System Information module.
This field indicates the date when the box or file has been removed from the inventory (date when the document became DELETED, DESTROYED or TRANSFERRED).

Volume (Box **module only)**
Drop-down field associated to a list defined in the Box Type module.
This field allows to select a volume for the current box, in accordance with the box type chosen from the list. Sometimes, the volume of a box type does not correspond exactly to the volume of the box location. It depends on customer and general settings (Volume Equivalence, Box field in the Customer Information module and Bypass volume check field in the System Information module).

Note : When a box is added in PRE ADD to the inventory, it is not necessary to enter a volume (associated to a box type) for that box. When boxes are sent to the record center, the system automatically attributes them the volume of the location where they are returned.

Vault (Box **module only)**
This box can be checked off to indicate that the box must be stored in the vault. This will have an effect when the box location will be chosen.

Location (Box **module only)**
Required alphanumeric field that can contain up to 20 characters.
This field indicates the storage location of the box within the record center. The locations are defined in the Location module.

Field 4 and 5 (Box **module only)**
Optional alphanumeric fields containing a maximum of 4 characters each.
These fields are for internal use and can be renamed in the Dictionary module.

Field 6 (Box **module only)**
Choice field that can contain "Yes" or "No".
This field is for internal use and can be renamed in the Dictionary module.

***Item Set**
Drop-down field associated to a list defined in the current module.
This field allows to associate an item to an item set. When one item associated to an item set is

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ordered, all the available items associated to that set are automatically ordered by the system.
To associate an item to an item set, simply select an item set in the drop-down list or add a new set manually by entering a description.

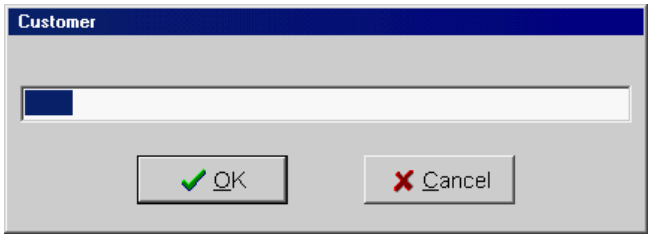
Note : It is possible to associate the files of a box to different sets, even if none of these sets is the same as the box set. When a file is ordered in a box and the box is not granted to the same set, only that file and the other files of the same set are added to the order. Nevertheless, when a box is ordered, all the files into that box are ordered indiscriminately.

9.5.2.3 Adding a box or a file to the inventory

The Box and File modules can be used to add new documents in PRE ADD to the inventory.

Documents can also be added directly to the IN state, but this operation is not recommended. It would be better to use the regular procedure in the Delivery Return module, in order to control that these documents are properly added to the right location (box or shelf.)

1. Click on **Inventory->Box|File** from the Main window.
2. Click on **Edit->Add|Add PRE ADD|Add PRE ADD Shelf** (files only). A window appears.



3. Enter the code of the desired customer and press **OK**.
4. Enter the required information in the appropriate fields (see the previous section 448 for more details).
5. Click on the **Accept** button to register the additions.

9.5.2.4 Using alternate bar codes while adding and editing items

You or your customers may wish to make use of bar codes that were created in other systems, in order to avoid the effort of applying new labels. These labels may be associated with the items in EDC by assigning them as Alternate Labels.

Note : Two items in belonging to the same account may not have the same alternate label. If items in different accounts share an alternate label, it will not be possible to move this item with the PDT using the alternate label, since the system will not know which item was moved. (Internal transfer lists and refile lists may be used instead, as these do specify the item.)

Edit or associate an alternate label to an inventoried item

1. Open the **Inventory->Box|File** module.
2. Navigate to the desired item.
3. Press **F5**, or select **Edit->Alternate Label**. A window appears.

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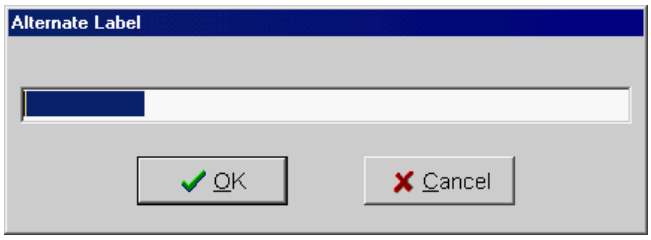


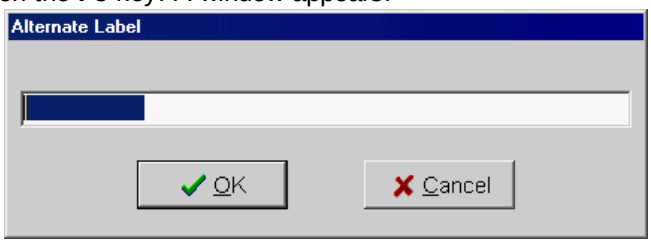
Note : If an alternate bar code is already associated to the item, it appears in the window. The new alternate bar code entered replaces the old one.

4. Scan or type the alternate bar code and press **OK**. (This may be done using a bar code scanner attached to the computer.)

Associate a pre-printed alternate bar code to a new item

This operation consists in putting pre-printed alternate labels onto new items and scanning the alternate bar codes when the items are added to the inventory in PRE ADD.

1. Click on **Inventory->Box|File** from the Main window.
2. Click on **Edit->Add PRE ADD|Add PRE ADD shelf** (File only). A window appears and allows to choose a customer.
3. A dialog box asks if a label is to be printed for each item. Click **No**.
4. Select the customer by entering the customer key or selecting from the list.
5. Enter the desired information in the appropriate fields (see the Fields[448] section for more details) and click on the **F5** key. A window appears.



6. Scan or type the bar code of the alternate label and press **OK**. Click the **Accept** button of the module's window to approve the addition of the item.

9.5.2.5 Batch adding boxes or files to the inventory

This operation adds boxes or files to inventory in batch for the same customer, department, and document type. It prompts you to enter information for the additional fields that you specify. Note that boxes can also be added in batch on a return[653], in which case an accessin fee will be applied.

1. Click on **Inventory->Box | File** from the Main window and select **Edit->Batch Addition\Edition** from the menu.
2. Select the customer to whom the boxes belong, either by entering the customer key, or pressing enter to select from a list.

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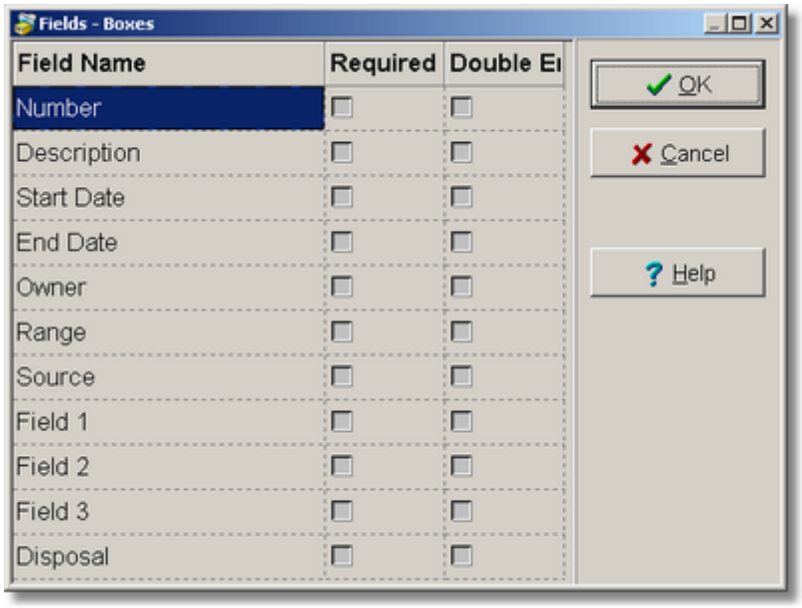
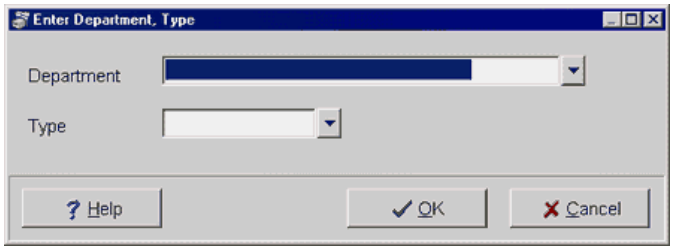


Note: When the double entry checkbox is selected beside a field, one will have to enter the data twice in each field that is required.

3. Check off the fields for which a value must be entered and press **OK**. A third window opens on the screen.

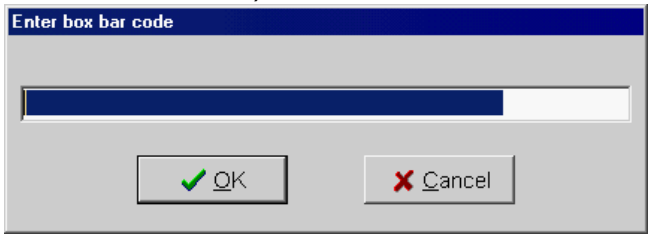
Note: If Disposal is selected, the disposal calculation will be set to fixed date, which you will be prompted to enter. The disposal mode will be taken from the record series (applies to boxes).



4. Enter a department and record series for the new files or boxes (use the choice buttons to choose a value in the list) then click on the **OK** button.
5. A dialog box asks "Are the labels pre-printed?". If the files or boxes have already been created and have a bar code, click **Yes**. If not, click **No**.

For files:

- The system prompts, "When the box is IN, would you like the files in the IN state? (otherwise the state of the files will be PRE ADD)". Press **Yes** to create the files IN, **No** to create them in PRE ADD.



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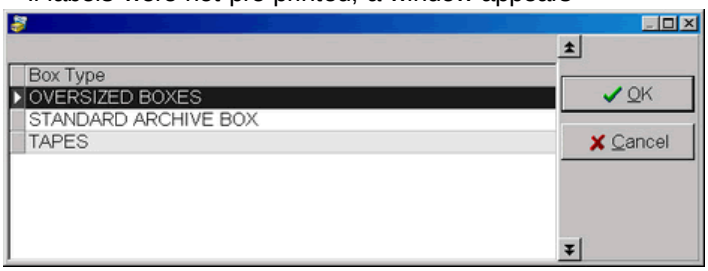
- Scan or manually enter the barcode of the box where the files will be stored and press **OK**.
- If file labels were pre-printed, scan or manually enter the file bar code.
- Enter the values for required text fields
- Repeat, then click the **Cancel** button when finished with files for this box.
- The system prompts."Continue to use the same Department and Document Type shown above ?". Click **Yes** to enter more files in another box for the same department and document type, **No** or **Cancel** to exit.

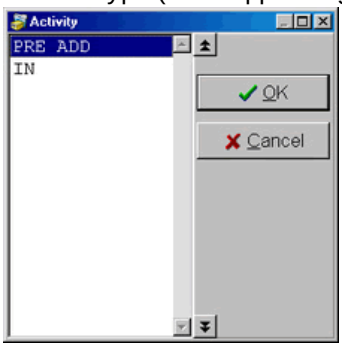
Note: The files can only be added into boxes whose state is IN, OUT or PRE ADD.

For boxes:

- If labels were pre-printed, scan or manually enter the box barcode.
- If labels were not pre-printed, a window appears



- Choose a box type (it will appear highlighted) and press **OK**. A window appears :



- Select the correct state and press **OK**
- If boxes are IN, select the transit location and press **OK**.

A window will appear for every required field and allows to enter the desired values. Proceed as many times as necessary and click on the **Cancel** button when finished. The boxes are automatically added to the inventory as specified.

9.5.2.6 Finding a box or a file

1 Click on **Inventory**->**Boxes|Files** from the Main window.
2 Choose how the item will be searched by selecting a search index[866] in the button bar as follows.

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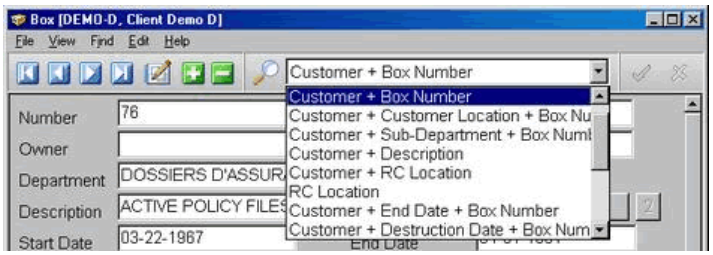
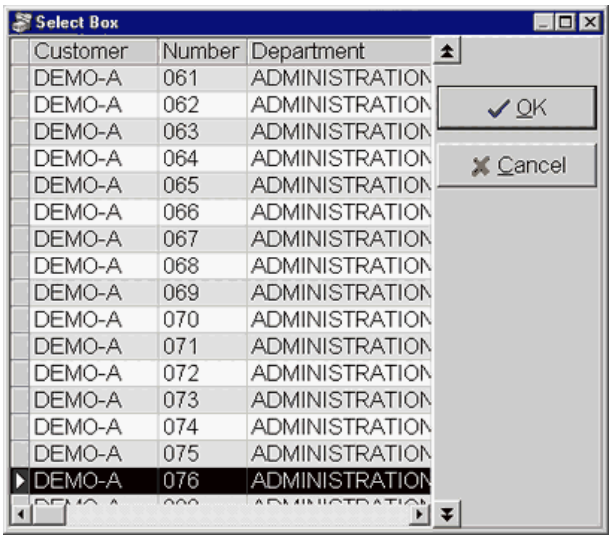

Box [DEMO-D, Client Demo D]
File View Find Edit Help
Customer + Box Number
Customer + Box Number
Customer + Customer Location + Box Nu
Customer + Sub-Department + Box Numt
Customer + Description
Customer + RC Location
RC Location
Customer + End Date + Box Number
Customer + Destruction Date + Box Num
Number 76
Owner
Department DOSSIERS D'ASSUR
Description ACTIVE POLICY FILES
Start Date 03-22-1967

3 Click on **Find**->**Find**. A window appears and allows to specify which customer is concerned.
4 Enter the code of the desired customer and press **OK**.

Note : Only the fields of the chosen search index are active and allow to enter data.

5 Enter the desired information in the appropriate fields and click on the **Accept** button. The system displays the searched item or the item for which its information are most similar with the ones previously entered.
6 If the searched item is near to the one displayed on the screen, it is possible to find it by scrolling the list of all the items. Click on **Find**->**Scroll** to do so. A window appears.



Note : The highlighted item is the one found in **5**.

7 Scroll the list with the scroll arrows and double-click on the searched item when it is displayed in the window (or press **OK)**. The system goes back to the main window of the module and displays the selected item. It then becomes possible to consult the information of this item and to edit its information.

9.5.2.7 Deleting a PRE ADD box

Only the documents in PRE ADD can be deleted from the system in the Box and File modules. The operation is irreversible and deletes the item, its notes and history. All this information can never be recovered after the confirmation of the deletion.

1 Click on **Inventory**->**Box** from the Main window.
2 Search the desired box (see "Finding a box or a file 455 ").
3 When the desired item is on the screen , click on **Edit**->**Delete pre add**. A dialog box appears.

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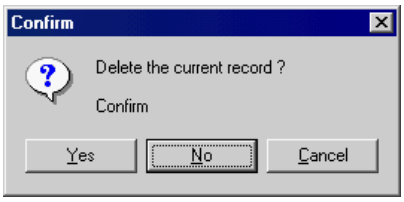


4 Click on the **Yes** button to confirm the deletion.

Note : An error message sometime appears when deleting an item with the current operation.

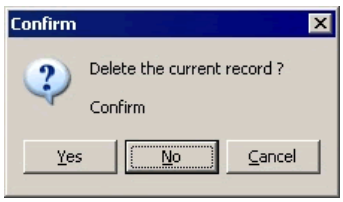
In order to maintain the integrity of the inventory, items that were mistakenly put to the IN state can be transferred to the PRE ADD state. To finally delete these items, it is then necessary to open the Remove PRE ADD module.

There is an operation, completely different from the current, that allows to transfer an OUT item to DELETE. This operation is performed through the creation of a deletion list in the module of that name. The documents are not deleted from inventory, they are only marked as deleted and the storage fees related to these documents are canceled. These documents can be reactivated later and it is possible to recover all the history and notes before their deletion.

9.5.2.8 Deleting a PRE ADD file

This allows the deletion of PRE ADD files that will not be used.

1 Click on **Inventory**->**File** from the Main window.
2 Click on **Edit**->**Delete PRE ADD**. A message appears.



3 To confirm press **Yes**, to abort the operation press **No** or **Cancel**.

9.5.2.9 Editing information related to a box or a file

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired box or file (see "Finding a box or a file[455] ").
3 When the desired item is on the screen click on **Edit**->**Edit**.
4 Modify the desired information in the appropriate fields (see "Fields[448] " of the current module for more details)
5 Click on the **Accept** button to save changes.

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9.5.2.10 Copying and adding a box or file

This operation allows to copy all the information of a box or file (description, department, type, etc.) and grant them to one or more PRE ADD items newly added to the inventory.

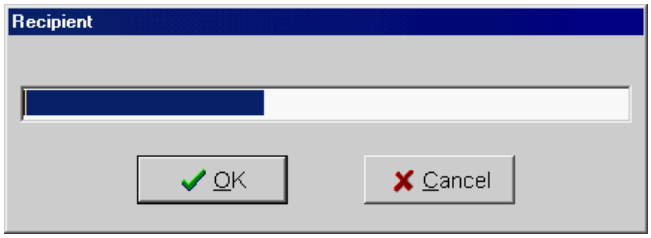
1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired box or file and keep it on the screen (see "Finding a box or a file 455 ").
3 Click on **Edit**->**Copy and Add**. The system automatically creates a new PRE ADD item.
4 Press **OK** to save the new item. A second item is created, similar to the one previously. Press **OK** again, in order to accept this second addition, or click on the **Cancel** button to terminate the operation.

Note : When copying boxes, the number of new items has to be changed because two boxes cannot have the same number.

9.5.2.11 Performing a change of hand for documents that are out

This operation allows to change the name of the person that has called back a box or a file from the inventory. The changes will appear in the history of the document.

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search for the desired box or file and keep it on the screen.
3 Click on **Edit**->**Change of hands**. A window appears.



4 Enter the desired name and press **OK**. The name entered here will appear in the document history and will indicate that a change of hands was performed. The name of the original recipient will still appear in the history.

9.5.2.12 Changing the cardboard of a box

This operation is useful if you encounter a box in your inventory that is excessively damaged and requires re-boxing. It prints a label for a new box. If the minimum number of touches has been exceeded, the system will charge the customer the following fees:

- Sale of a box (price code 1.2)
- Re-boxing fee (price code BCHG)
-Trip charge, if one is applied to the delivery type specified for box change 369 in Management->System Information.
- Box retrieval price code (if the status of the box is IN)
- Box refile price code (if the status of the box is IN)

To change the box cardboard:

1. Open the **Inventory->Box** module.
2. From the menu, select **Edit->Change box cardboard**. A window appears.

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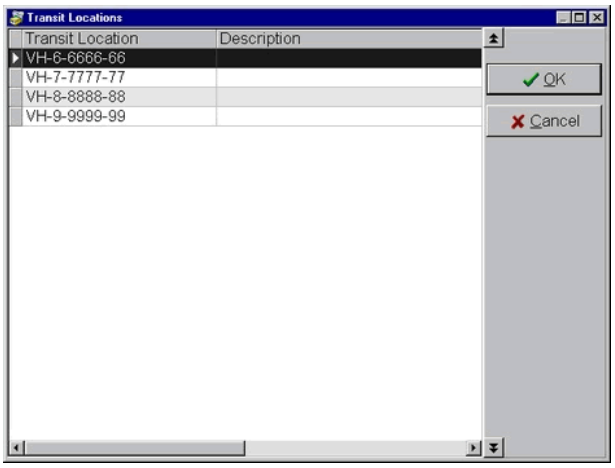
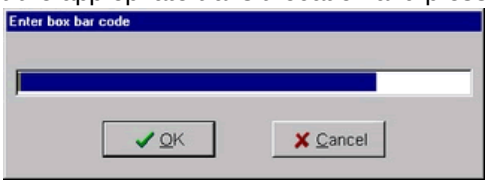


3. Select the appropriate transit location and press **Enter** or click Okay.



4. Type or **Scan** the bar code of the box. The thermal label will automatically be printed.
5. Repeat the operation as many times as needed and click **Cancel** or press **Esc** when you are finished.

Note: The system will give you an error if a delivery type as not been set as default in the Box Chg. Delivery Type[369] field of the System Information module.

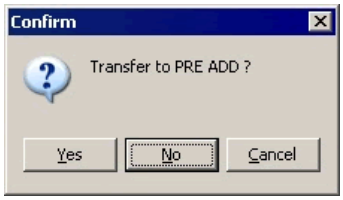
6. "Box change" and the name of the employee that performed the box change is added to the history of the box. Each box is moved to the transit location specified by the user. An order and a delivery are created for billing purposes. The delivery remains in the Returned state until the boxes are either Out or sent to a permanent location.

Note: The system charges for a standard box (price code 1.2). If you have used a different box size, mark this on the delivery slip. When the delivery slips are reviewed, add[718] the correct box sale price code as a line item and remove[718] the 1.2 charge. (See Overview (Delivery Billing[712].)

9.5.2.13 Transferring a file to PRE ADD

This operation allows to transfer a file (in a box) from the DELETED state to the PRE ADD state (into a box).

1 Click on **Inventory**->**File** from the Main window.
2 Click on **Edit**->**Transfer To PRE ADD**. A window appears.



3 To confirm press **Yes**, to cancel press **No** or **Cancel**.

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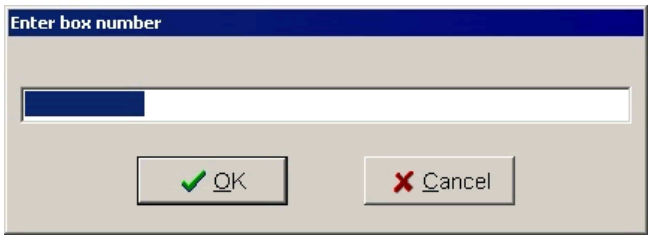
4 If you pressed **Yes**, a window appears.



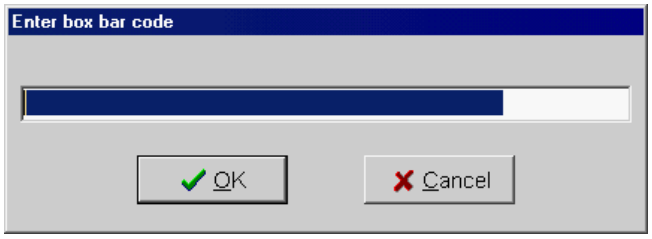
5 Enter a box number (to have the list of boxes press **OK**, select a box and it will appear highlighted) and press **OK**.

Note: The box must be OUT or in PRE ADD.

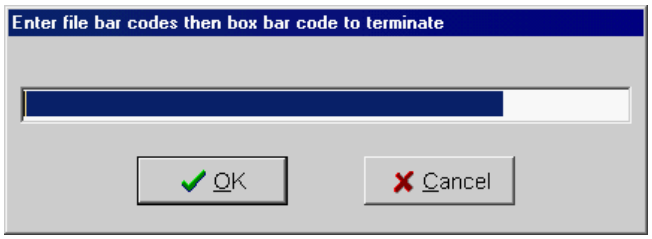
9.5.2.14 Transferring an open shelf file into a box

This operation allows to transfer a file from the IN state (on open shelf) to the PRE ADD state (into a box).

1 Click on **Inventory**->**File** from the Main window.
2 Click on **Edit**->**Transfer Shelf Files to Box**. A window appears.



3 Scan or enter the box bar code where the files will be transferred and press **OK**. The box must be in PRE ADD. Another window appears.



4 Scan or enter one after the other the bar codes of the files that are transferred and press **OK** after each file. When the last file has been added, scan or enter the box's bar code again. The window opened in **2** reappears and allows to repeat the operation for another box. Proceed or click on the **Cancel** button to terminate the operation.
5 All the related files now appear in PRE ADD; they could be put in the IN state when the box where they were transferred will be returned to the record center.

9.5.2.15 Transferring a file from a box to an open shelf

This operation allows to transfer a file from a box to an open shelf

1 Click on **Inventory**->**File** from the Main window.

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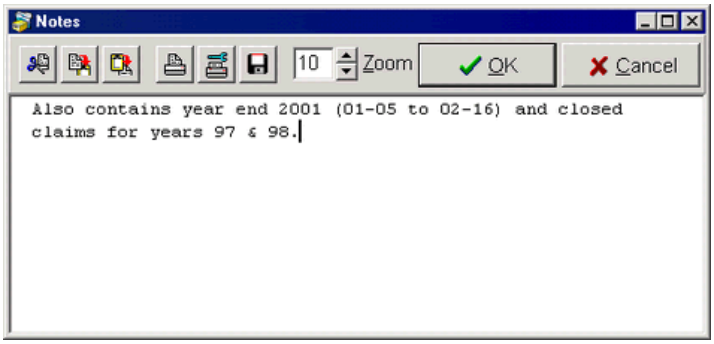
2 Click on **Edit**->**Transfer From Box to Shelf**. A window appears.

3 To confirm press **Yes**, to cancel press **No** or **Cancel**.

Note: This operation can also be done with the PDT (see Moving items 766)

9.5.2.16 Viewing or editing notes associated to a box or a file

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired box or file (see "Finding a box or a file 455").
3 When the desired document is on the screen, click on **View**->**Notes** or on **Edit**->**Notes**. A window appears.



Note : This window is the one displayed when editing notes. When viewing notes, some buttons are not displayed or disabled.

4 Edit the notes and click on the **Accept** button to save changes or click on the **Close** button when finished viewing notes.

Note: This operation will appear in the history of the box as a "general change", if the notes were modified.

9.5.2.17 Viewing the internal notes of an item

The internal notes of a box or a file are defined in the Internal Note 579 module. These notes explain internal operations and can never be viewed by the customers.

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired document and keep it on the screen, then click on **View**->**Internal Notes**. When the case arises, a report window appears and displays the internal notes for the document in question. When no internal notes have been defined for that document, the following box appears.

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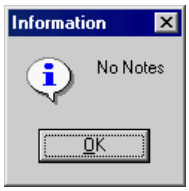


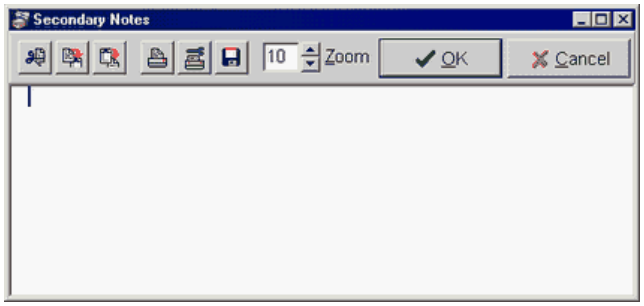
3 Click on the **Close** button of the report window or on the **OK** button of the information box to end the operation.

9.5.2.18 Viewing or editing the secondary notes of an item

The secondary notes are viewable at the record center and in the customer version of EDC. They are replicated as any inventory data. They are dissociated from the regular notes of the item (Notes 448 field in the Box and Files modules) but have the same function.

Adding secondary notes to an item

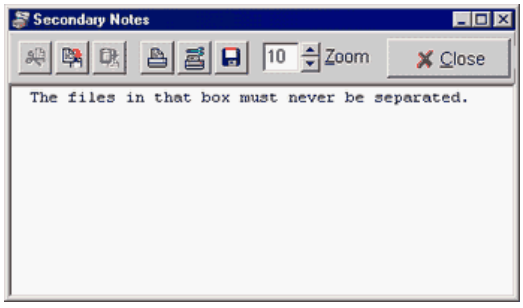
1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired item and keep it on the screen, then click on **Edit**->**Secondary Notes**. A window appears.



3 Enter the desired notes and press **OK**.

Viewing the secondary notes of an item

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired item and keep it on the screen, then click on **View**->**Secondary Notes**. When secondary notes have already been defined for the item, a window appears.



Note : When no secondary notes have been defined for the related item, a message appears in order to advise the user.

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3 Click on the **Close** button to end the viewing.

9.5.2.19 Adding items to an item set or viewing items of item set

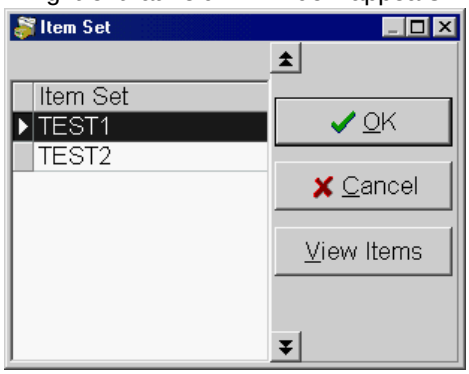
For more details about item sets, see the Item Set[451] field in the Box and File modules.

Creating an item set

1. Click on **Inventory->Box|File** from the Main window.
2. Select any inventoried item that can be edited and click on **File->Edit**. When the module is in the edition mode, move the cursor to the Item Set field and enter a name for your item set in the drop down field.
3. When all the changes have been performed for that item, click on the **Accept** button. The item set you have created will automatically be added to the list.

Adding an item to an item set

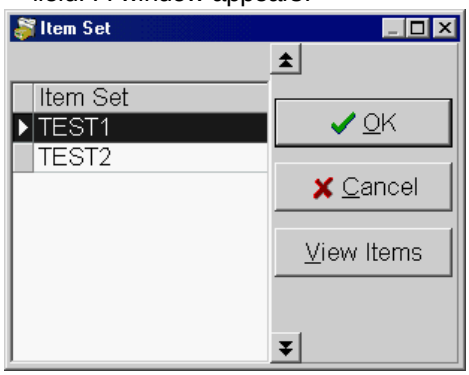
1. Click on **Inventory->Box|File** from the Main window.
2. Select any inventoried item that can be edited and click on **File->Edit**. When the module is in the edition mode, move the cursor to the Item Set field and click on the drop down button located to the right of that field. A window appears.



3. Select the item set of your choice, and press **OK**.
4. When all the changes have been performed for that item, click on the **Accept** button.

Viewing items of an item set

1. Click on **Inventory->Box|File** from the Main window.
2. Select any inventoried item that can be edited and click on **File->Edit**. When the module is in the edition mode, move the cursor to the Item Set field and click on the button located to the right of that field. A window appears.



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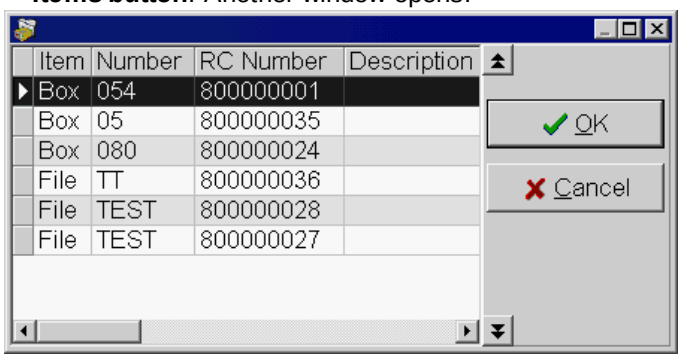
3. Select an item set whose items must be viewed (it will appear highlighted) and click on the **View Items button**. Another window opens.

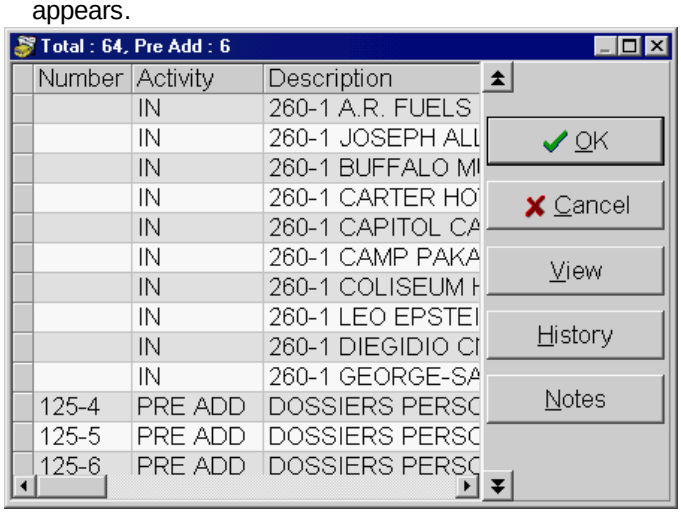


4. This window displays the list of all the items associated to the item set. Click on the **OK** button to end the viewing and to go back to the window opened in 2.
5. If desired, repeat the operation for another item set or click on the **OK** button to have access to the other fields.

9.5.2.20 Viewing files within a box

From the Box module

1. Click on **Inventory->Box** from the Main window.
2. Search the desired box (see "Finding a box or a file[455] ").
3. When the desired box is on the screen click on **View->Files**. The list of the files contained in the box appears.



4. Press **OK** when finished.

Note : The View, History and Notes buttons allow respectively to view the details of the selected file (highlighted), its history or its notes.

From the File module

1. Click on **Inventory->File** from the Main window..
2. Search a first file for the desired box (see "Finding a box or a file[455]") by selecting the search index "Customer + Box".

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3. The module displays the first file contained in the selected box. To view the other files within that box, simply navigate with the button bar or use the navigation shortcuts.

9.5.2.21 Printing bar code labels

Normally, the bar code labels for new documents are printed when they are sent to (returned) and added in inventory at the record center. This operation is performed in the Delivery Return module. These labels and their parameters are an internal part of the software and are printed on a thermal printer, but one of the available format can be chosen from the Main window or the System Information[365] module.

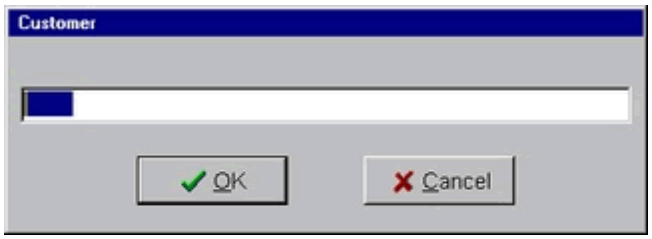
For many reasons it can be necessary to reprint some of these labels. It is possible to do it from here.

Printing a thermal label

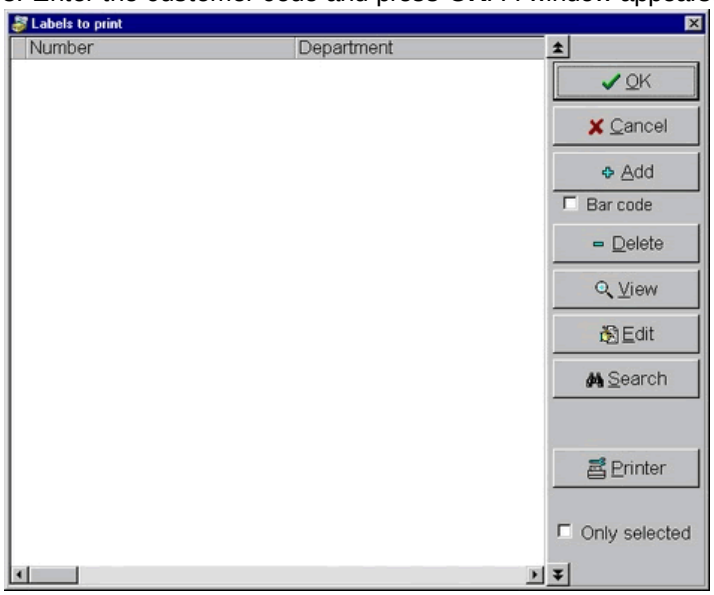
1. Click on **Inventory->Box|File** from the Main window.
2. Search the desired box or file (see "Finding a box or a file[455] ").
3. When the desired item is on the screen click on **File->Print Thermal Label** or simply press **F7**. The label is automatically printed on the thermal printer of the workstation.

Printing many thermal / laser labels

1. Click on **Inventory->Box|File** from the Main window.
2. Click on **File->Print Thermal/Laser Labels**. A window appears.



3. Enter the customer code and press **OK**. A window appears.



4. Perform a search for the boxes/files you want to print labels for, or simply add the boxes you want to print in the list. Press **OK** when all the boxes or files you want are on the list.
5. If you are printing boxes, the system asks if you want to print the files' labels as well. Press **Yes** to

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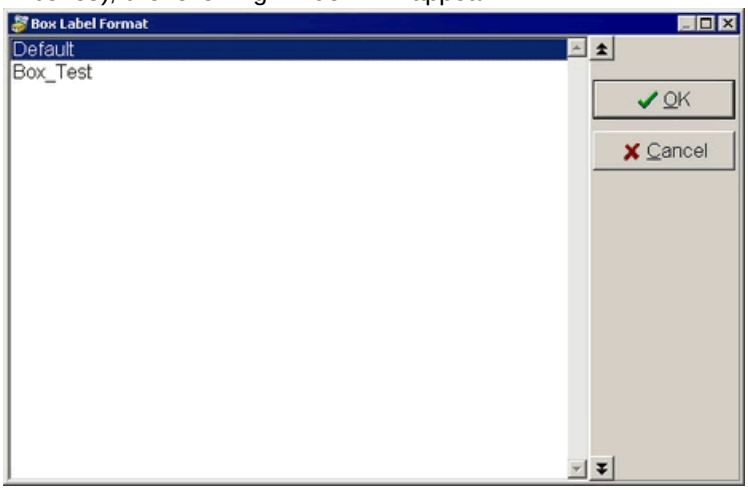
print them, and **No** or Cancel to print only the boxes' labels.

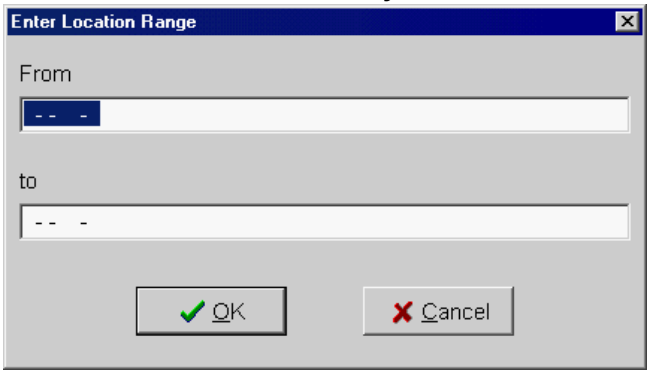
6. If the thermal label option was chosen, the labels will print automatically after this. When printing laser labels, if a customer has another label template[291] available (other than the defaults for files and boxes), the following window will appear :



7. Select a label template in the list and press **OK**. The labels are printed automatically on the default or selected printer.

Printing labels for specific locations (Box **module only)**

1. Click on **Inventory->Box** from the Main window.
2. Click on **File->Print Labels By Location**. A window appears.



3. Enter an interval of locations and press **OK**. The labels of the boxes stored in these locations are automatically printed.

9.5.2.22 Printing Imaging Separator Pages

Images can be imported efficiently into EDC if they are named after the bar code of the file. (See the topic Importing Images[440]).

To accelerate the scanning and naming of multiple files, EDC can print an imaging separator page to place before each physical file. These files are then scanned as a single batch, and then processed using inexpensive third-party software for import into EDC. (See knowledge base article KB00145 at client.docudatasoft.com for instructions.)

To print imaging separator pages:

1. Click on **Inventory->B**ox from the Main window.

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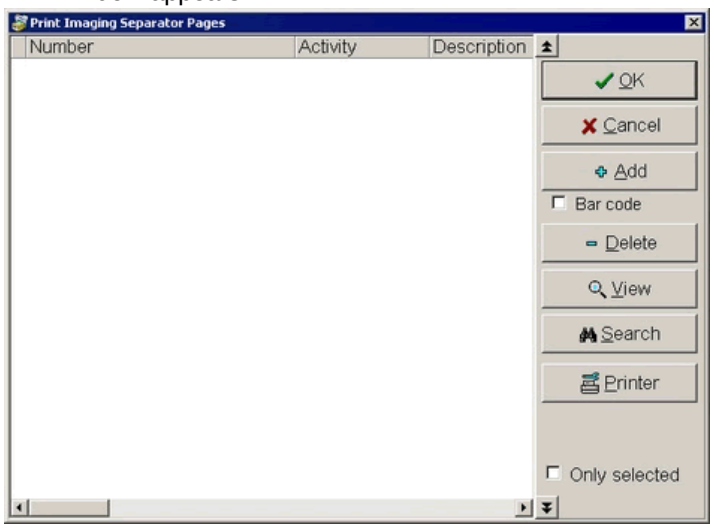
2. Click on **File->Print Imaging Separator pages**. A window appears.
3. Enter the customer key or click on **OK** to have the list of customers (select a customer - it will appear highlighted - and press **OK**). Press **OK**.
4. A window appears.



5. To add a file, press **Add**.
6. A message appears: "Select by description?" Press **Yes** to accept, press **No** to select by number or press Cancel to abort the operation.
7. Enter the file number and **OK** to select the starting point of the list or press **OK** to have the list of files.
8. To delete a file from the list, select the file (it will appear highlighted) and press **Delete**.
9. When the list is complete, press **OK**. The bar codes of the files will automatically be printed on the laser printer.

EX:

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```
File   0-65-6-43 INS CO OF N.A

Customer            : DEMO-C
Status              : IN
RC Number           : 231302
Description         : 0-65-6-43 INS CO OF N.A
Department          : CLAIMS/CHICAGO
Type                : CL
Start Date          : 1974/03/15  End Date 1974/03/15
Disposal            : Non Confidential  1980/03/15  Variable
Owner               :
Source              :
Field 1             :
Field 2             :
Field 3             :
Range               :  to
Old Number          :
Access Level        : 0
Entry Date          : 1995/08/24
Withdrawal Date     :     /  /
Box                 : 37
Location            : VH-9-0101-12
```

9.5.2.23 Print inter-file label

Inter-file labels are non-bar coded labels with the information required to help you to put a document or partial file into the correct file in the correct box.

To print an inter file label:

1. Open the **Inventory->File** module.
2. Locate the desired file.
3. Press **Alt-F7**, or from the menu, select **File->Print inter-file** label.

The label will print.

Note that if you need to make adjustments to the label layout, you may do so through the **Management->System Information** module, **Edit->Label Templates**., as described here[88] .

***

9.5.2.24 Batch indexing

Batch indexing updates the index used by the Full Text Search for the specified records.(see Setting up a customer to use Full Text Search at RC [126]in the Procedures module in the manual.) When batch indexing one or many boxes, the software will not index the boxes' files. (You can index files and images through the file module.) Batch indexing may take a while, and could possibly slow down EDC for all users (it is better to do a batch indexing during less active periods.)

Batch indexing

1. Open the **Inventory->Box** module.
2. From the menu, select **File->Batch indexing->(With Search | By RC number).** For files you have the option of indexing files, or the images that the files contain.

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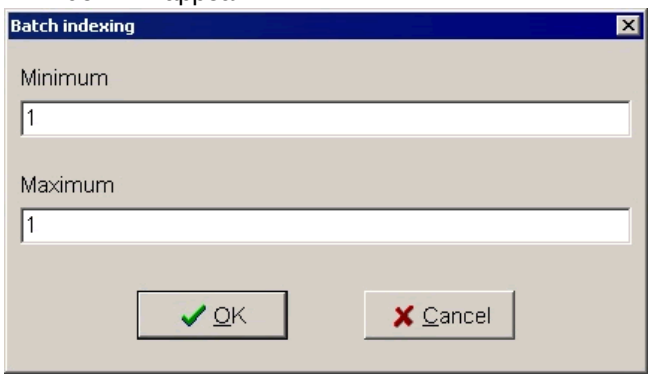
3. Choose a customer (to have the list of customers press **OK**, select a customer --- it will appear highlighted)

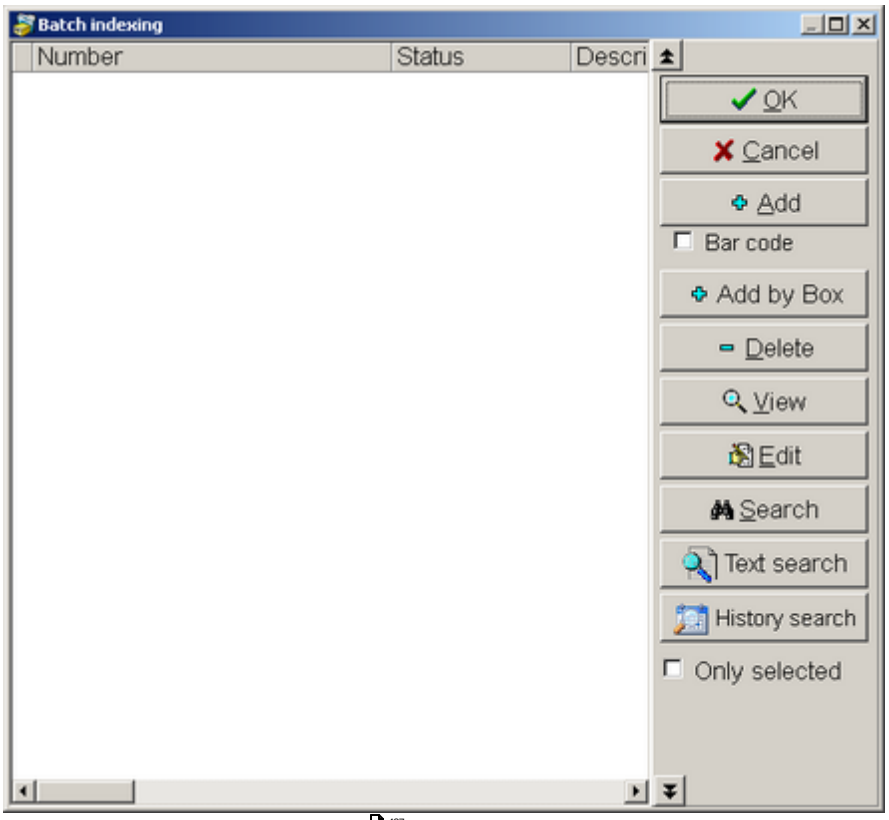
By RC number

A window will appear



4. Choose a range of RC numbers to index. Press **OK**. The system will index the specified items.

With search



5. The standard Box|File search[487] window appears.

- Use the buttons to the right to build a list of items to index.
- To delete certain items from the list select one or many items (they will appear highlighted) and press the Delete button.
- If the "Only selected" box is checked, only those items highlighted in black will be indexed.

6. When the list is complete press **OK** again (the software will index the content of the files and boxes

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chosen)

9.5.2.25 Editing the report options for inventory lists

The reports of boxes and files are generally pre-defined in the System Information[386] and Customer Information[299] modules and one report is set as the default report.

But for every inventory list produced from the Box or File module, it is possible to choose the desired pre-defined report and also to modify the information that will be displayed on the list. These modifications are not saved in the system and are lost as soon as the Box or the File module is closed.

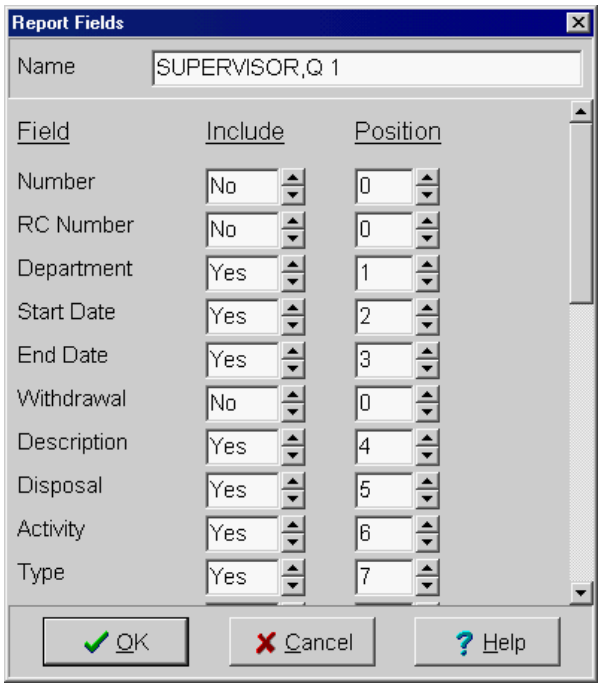
Select a report to produce an inventory list

1. Click on **Inventory->Box|File** from the Main window.
2. Click on **File->Report Options->Box|File (Box module)->Select Predefined Box Report|Select Predefined File Report** . A list appears and displays all the reports predefined in the system.
3. Select the desired report (it will appear highlighted) and press **OK**. The system goes back to the module's window.

Edit the information of the chosen report

Consider that the Box or File module is opened and that a report has already been selected (previous operation).

1. Click on **File->Report Options->Box|File (Box module)->Modify Box Report Fields|Modify File Report Fields**. A window is displayed.



2. Click on the **choice buttons** of the Include column and set the desired fields to "Yes" or "No" if these fields must appear or not on the report. For all the fields that are set to "Yes", click on the choice button in the Position column and set their display order. Press **OK** to terminate the operation. The system goes back to the module's window.

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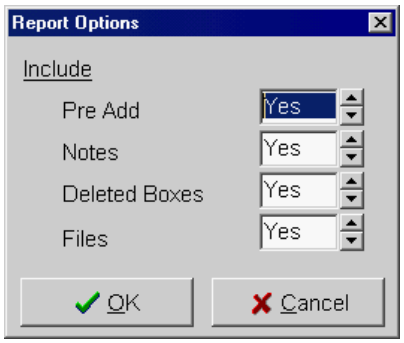
Every inventory list viewed or printed after the current operation will only display the information chosen in 2.

Select specific report options

This operation allows to specify if documents in a particular state must be included on the report and also some specific information.

1. Click on **Inventory->Box|File** from the Main window.
2. Click on **File->Report Options->Report Options**. A window appears.

For boxes :

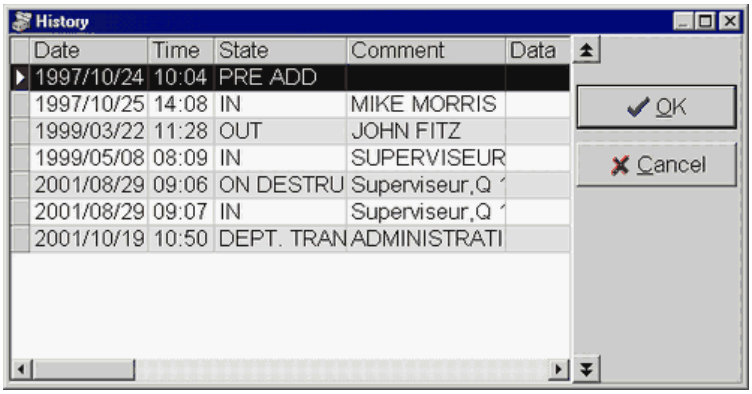


Pre Add allows to include the PRE ADD boxes on the report.
Notes allows to include the notes of the boxes on the report.
Deleted Boxes (or Deleted Files) includes the DELETED items on the report.
Files (applies to boxes only) includes the files contained in the boxes on the report.

3. Use the **choice buttons** to set the desired options to "Yes" or "No" and press **OK**.

9.5.2.26 Viewing history related to a box or a file

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired box or file (see "Finding a box or a file 455 ").
3 When the desired item is on the screen click on **View->History** or press **F3**. The report window appears.



4 Press **OK** to end the viewing.

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9.5.2.27 Viewing or printing a list of boxes or files

From the Box **module**

1 Click on **Inventory**->**Box** from the Main window.
2 Click on **File**->**View Report**|**Print Report**->**All Boxes**|**Customer Only**, and select one of the available sub-menus.
3 According to the chosen menu option, enter the requested information in the windows that are displayed consequently. The related report will be printed or displayed soon after.

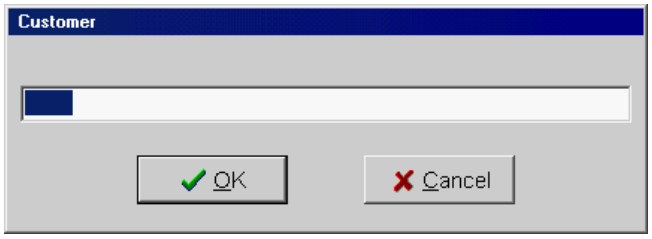
Note : When a report is produced for the first time in a module, a window automatically opens and allows to choose the predefined report for boxes. Furthermore, when files are included on the report (according to the report options), a second window appears and asks to choose the predefined report for files. These reports are created in the Customer Information and System Information modules.

From the File **module**

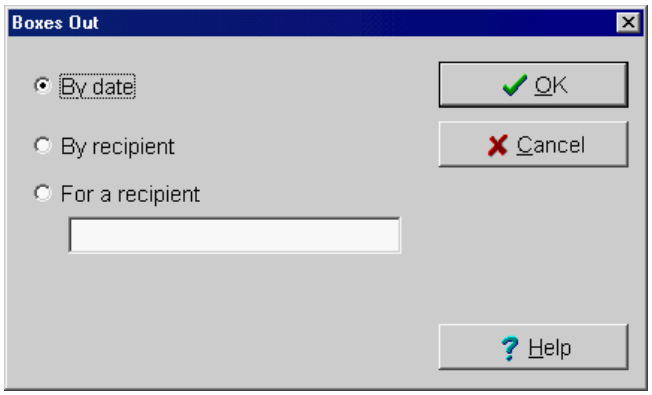
1 Click on **Inventory**->**File** from the Main window.
2 Click on **File**->**View Report**|**Print Report**, select one of the available sub-menus and proceed as for boxes. The related report will be printed or displayed soon after.

9.5.2.28 Viewing or printing the list of boxes or files that are out

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Click on **File**->**View Report**|**Print Report**->**Files Out** (File module) or on **File**->**View Report**|**Print Report**->**Customer Only**->**Boxes Out**.



3 Enter the code of the desired customer and press **OK**. A new window is displayed.



Note : For box reports, another window appears previously and allows to choose a predefined report.

4 Select how the results will be displayed on the report by checking off the appropriate option and press **OK**. The report will be printed or displayed soon after. When viewing reports, click on the **Close**

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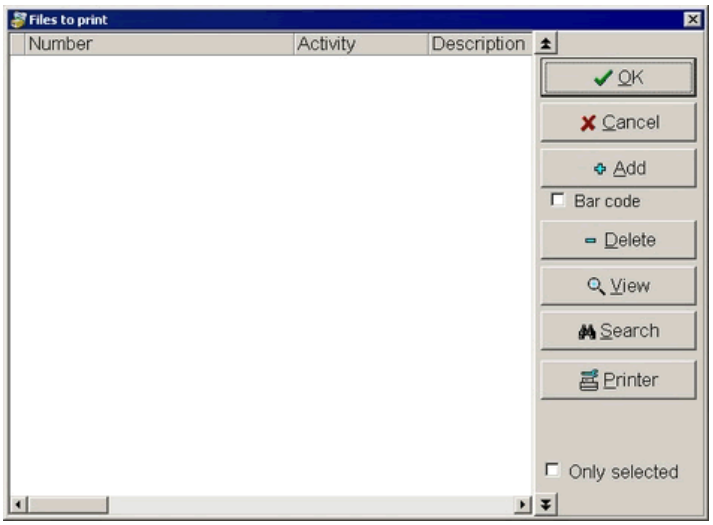
button of the report's window to finish.

9.5.2.29 Printing Box and File Details

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired item.
3 Click on **File**->**Print Box|File Details.** A window appears.
4 Enter the customer code or press **OK** to have the list of customers (select a customer and it will appear highlighted). Press **OK**. A window appears.



5 To add a box|file press the **Add** button.
Files: a message will appear asking to select files by description: press Yes to select files by description; press No to select by number; press Cancel to abort the addition of files. If you said Yes, enter a description and press **OK**. If you said No enter a file number and press **OK**. In either case a list of files will appear, select the desired files (they will appear highlighted) and press **OK**.
Boxes: a window will appear asking for the box number; enter a box number and press **OK**. A list of boxes will appear, select the desired boxes (they will appear highlighted) and press **OK**.
6 To delete a box|file from the list: select the box|file from the list (it will appear highlighted) and press the **Delete** button.
7 When all boxes|files have been added to the list press **OK**.
8 The details will automatically be printed for the selected boxes|files.

9.5.2.30 Viewing and adding keywords

Keywords are used to facilitate the Full Text Search. To activate the Full Text Search (and the keywords option) for a customer, see the Setting up a customer to use Full Text Search at RC 126 topic.

Viewing keywords

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired item, click on **View**->**Keywords**. A window appears with the keywords of the box|file.

Adding keywords

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired item, click on **Edit**-> **Extra Keywords**. A window appears.

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3 Enter the new keywords.
4 To terminate the operation and save the new keywords press **OK**. To cancel the operation and the new changes press **Cancel**.

9.5.2.31 Viewing or editing the alternate label of a box

Viewing alternate labels

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired item, click on **View**->**Alternate Label**. A window appears with the alternate label of the box|file.

Editing alternate labels

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired item, click on **Edit**-> **Alternate Label**. A window appears.
3 Enter the changes.
4 To terminate the operation and save the new keywords press **OK**. To cancel the operation and the new changes press **Cancel**.

See also the topic Using alternate labels while adding and editing items 452 for more information.

9.5.2.32 Viewing the last orders of a box or file

Viewing the last orders of a box|file

1 Click on **Inventory**->**Box**|**File** from the Main window.
2 Search the desired item, click on **View**->**Last Order**. A window appears with the last order(s) of the box|file.

9.5.2.33 Imaging module

9.5.2.33.1 Overview (Imaging)

The Imaging module is accessible from the File module instead of the Main window. This is because images are associated with the files from which they were created.

Available reports

- (None. See the Report 501 module)

Fields

- (Image)

Tasks

- Opening the Imaging module 475

Distinctive menu options:

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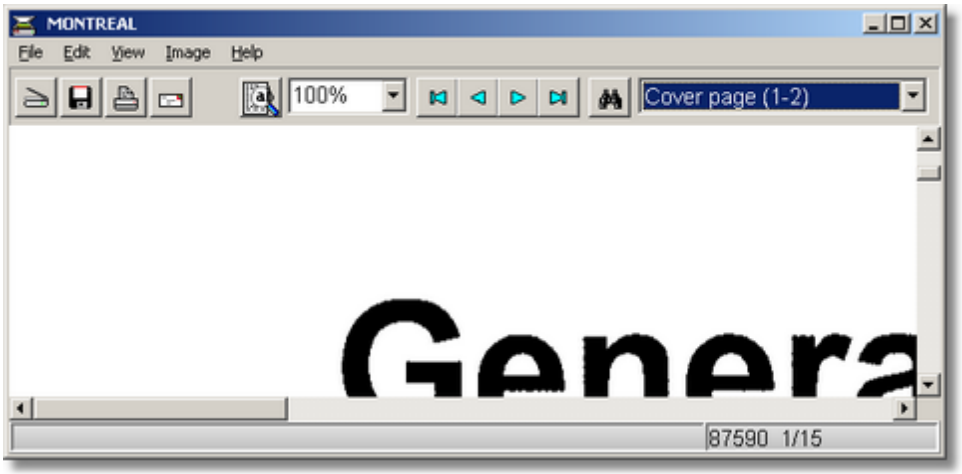
File menu
- Scan 476
- Select Scanner 476
- Save (Saving scanned images) 478
- Print (Printing scanned images) 477
- OCT (Performing Optical Character Recognition) 480
- OCR and index 481
- OCR Indexing Options 482
- Email (Sending images by Email) 482
- Import (Importing images) 483
- Export (Exporting images) 483

Edit menu
- Undo
- Copy Image 483
- Paste New Image 483
- Find
- Documents 479
- Delete Image(s) 478
- Delete separator page 479
- Keywords 480

View menu
- Viewing an image 484 (various options)
- Keywords 480
- Viewing the information of an image 484

Image menu
- Editing a scanned image 477 (various options)

Module window:



9.5.2.33.2 Opening the Imaging module

1. In the **Inventory->File** module, navigate to the desired file.
2. Press **Ctrl-I**, click on the images icon , or select **File->Images** from the menu.
3. The Imaging module's window is displayed on the screen.

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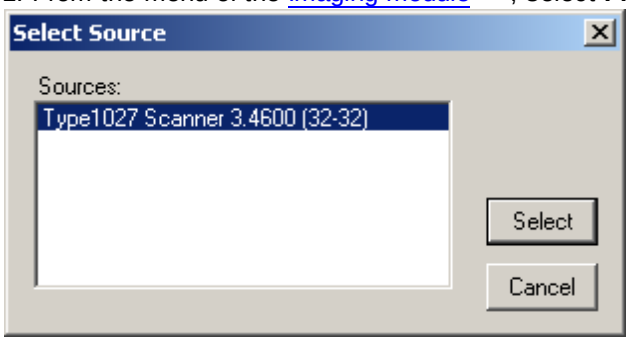
Note : The Images icon is only present when documents have already being scanned in the file.

9.5.2.33.3 Selecting a scanner

1. From the menu of the Imaging module[475], select **File->Select scanner**.



2. Choose one of the scanner engine attached to the workstation and click **Select**.
Note: EDC RC requires a TWAIN-compliant driver in order to operate your scanner. These drivers are usually available for download from the website of the manufacturer of the scanner.

9.5.2.33.4 Scanning documents

When documents are imaged for a customer in EDC RC, they can be viewed by the customer online through ActiveWeb (with the appropriate web license) or EDC ActiveFile.

Important Note: The present method does not capture charges. Scanning to fulfill imaging on demand[178] orders is done in the imaging on demand[635] module. Larger imaging jobs are frequently scanned and then imported[483].

To scan images directly to EDC without capturing charges:
1. From the Imaging module opened to the correct file, click **File->Scan**, or click the **scan** button. A window specific to your scanner appears.
2. Perform the scanning.
3. Process[477] the image if desired, with various options on the **Image** menu
4. Save[478] the image. (**File->Save**)

The images are saved in the default image directory of the system (settings of the System Information module). These images are available immediately on the web and will be available in EDC ActiveFile upon replication.

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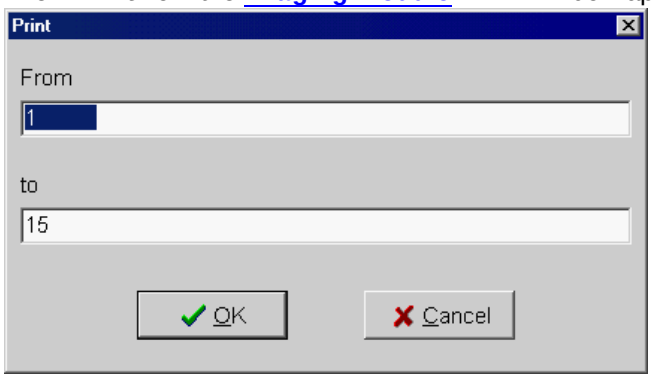
9.5.2.33.5 Printing scanned images

1. Click **File->Print** from the **Imaging module**[475]. A window appears.



2. Enter an interval of pages to be printed and press **OK**.
3. The images will automatically be printed from the default printer.

Note : Printing parameters can be modified by clicking on **File->Print Setup** from the Imaging module.

9.5.2.33.6 Editing a scanned image

When documents have just been scanned but are not saved, the scanned images can be modified. For example, when a document is scanned recto-verso, the header of the verso image is upside down. Then it is necessary to rotate this image with a 180° angle. As soon as it is saved, the content of a scanned image cannot be modified anymore. It will be displayed, printed and exported as it was modified and not as the original scanned content.

1 On from the menu, **Select image**, then one of the following sub-options:

- **Rotate->90°|180°|270°|Arbitrary.**
- **Mirror->Horizontal|Vertical.**
- **Negative.**
- **Scale to gray.**
- **Sharpen.**
- **Smooth.**
- **Contrast->Increase|Decrease.**
- **Brightness->Increase|Decrease.**
- **Gamma Correction**. A window appears. Enter a numeric value to specify the degree of correction and press **OK**.
- **Format Conversion**. Check off the desired boxes in the following window and press **OK** when finished.

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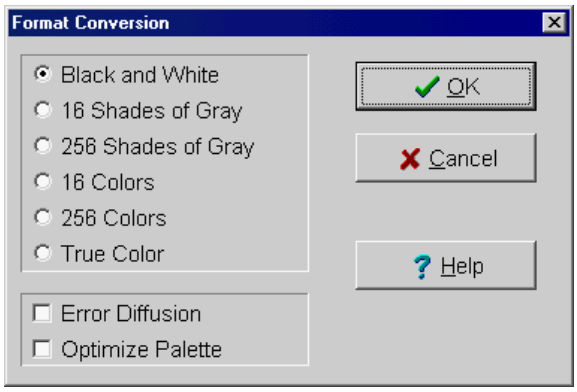


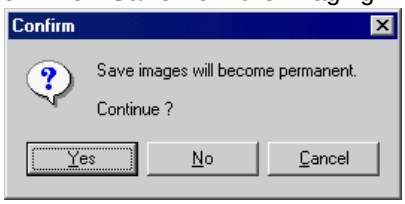
- **Deskew**
- **Despeckle**
- **Border clean up**

3 A window is displayed after choosing and specifying a type of modification. Enter the interval of pages for which the changes will be applied and click on the **Accept** button.

9.5.2.33.7 Saving scanned images

Images become permanent when they are saved. Therefore, all changes must be done before (see "Modifying images 477 ").

1. Click on **File->Save** from the Imaging module. A dialog box appears.



2. Click on the **Yes** button to confirm the operation.

(The system will automatically prompt you to save or cancel images if you attempt to exit the module without saving.)

Note: When images are saved, the number of images scanned or imported is recorded in the history of the file for reporting purposes.

9.5.2.33.8 Deleting images (before saving)

When documents have just been scanned but are not saved, the images can be deleted. Once the images are saved this is no longer possible.

1. Click on **Edit -> Delete image(s)**. A window appears.

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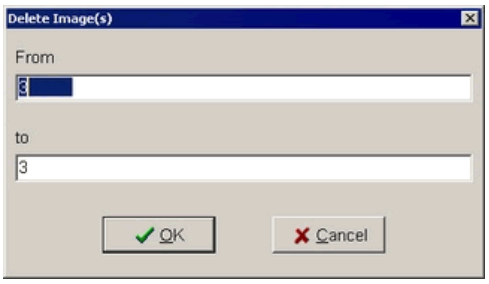


2. Enter a deletion range and press **OK**.
3. Click **Yes** to confirm
4. The image(s) will be deleted.

Note: Images that have been saved can only be deleted for the whole file[444], through the box and file maintenance module.

9.5.2.33.9 Deleting a separator page (before saving)

Document separator pages[383] allow you to automatically name ranges of pages as you scan and import pages. However, if a page is not identified as a separator page by EDC, it remains as an image. To remove this page prior to saving:

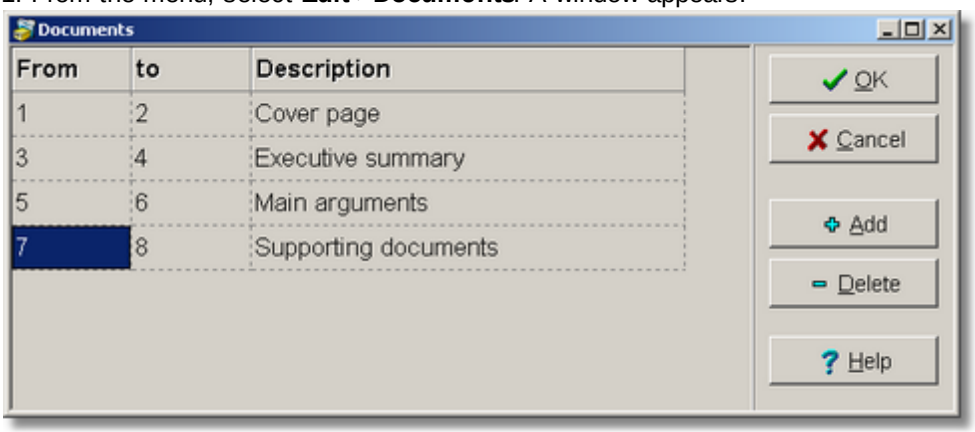
1. From the menu of the imaging module, select **Edit->Delete separator page**.
2. A dialogue window prompts "Delete separator page", defaulting to the number of the page presently displayed. Enter the number of the page to be deleted, then click **Okay** or press **Enter**.

The page will be removed and the numbering on the index will be adjusted.

9.5.2.33.10 Editing a document index

Creating a document index for scanned images makes the pages in a file easier to find, when you have multiple pages of images.

1. From the menu, select **Edit->Documents**. A window appears.



2. To add to the index, click the **Add** button. A new line is added
3. Click on the table to edit the to page and the Description.
4. When done, click the **OK** button to accept
5. Once the index is created, you can view the index in the drop down field of the Imaging module like so:

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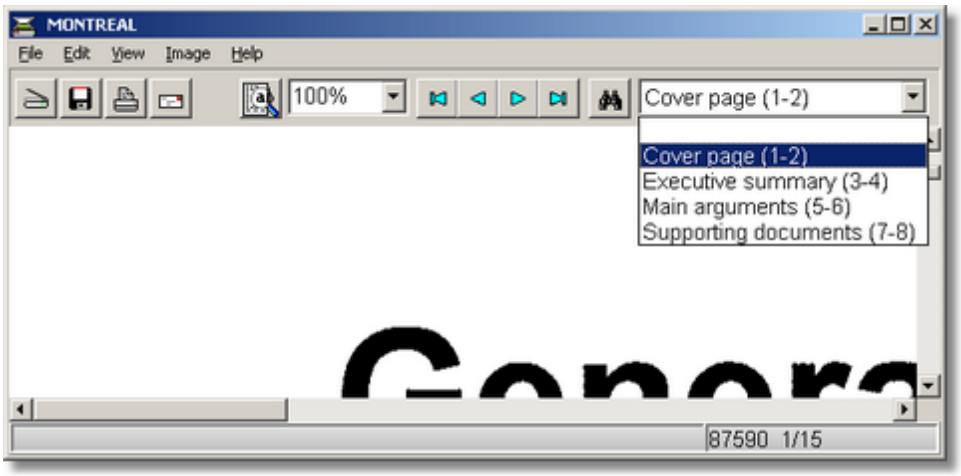
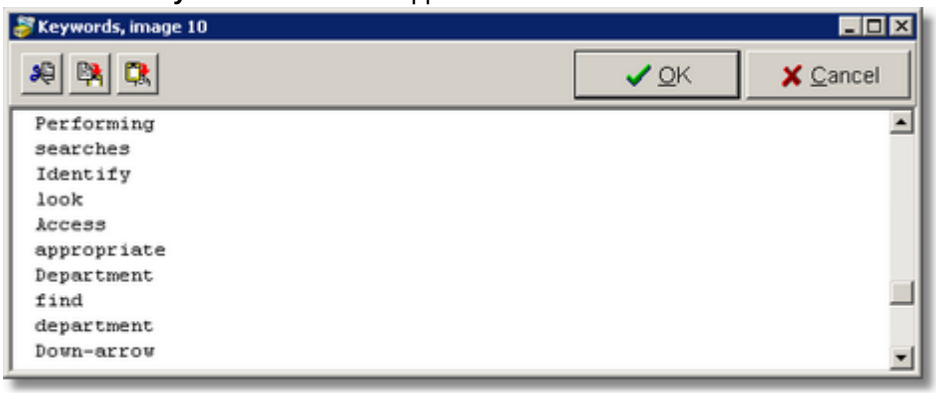


9.5.2.33.11 Editing or viewing keywords for an image

Performing OCR and index[481] on an image causes the recognized text to be added as keywords. These are then available through the full text search. However, you may wish to view and modify this list. To do so:

1. Open the imaging module to the correct image[475]
2. Click **Edit->Keywords**. A window appears.



3. Make any changes directly in the window or using copy and paste, then click **Ok** to accept.

9.5.2.33.12 Performing Optical Character Recognition (OCR)

Optical Character Recognition (OCR) converts recognized elements of an image into editable text. The accuracy depends on the resolution and the clarity of the text in the image. Typically, black and white images scanned at resolutions of 240 DPI (dots per inch) or higher produce better results.

(In EDC the image resolution can be viewed in the image information[484].)

1. Open the imaging module (**Inventory->File** module, **File->Images**)
2. Click on **File->OCR** from the Imaging module. A window appears.

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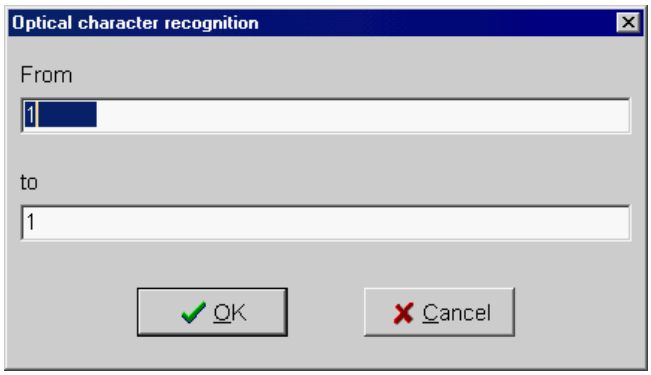
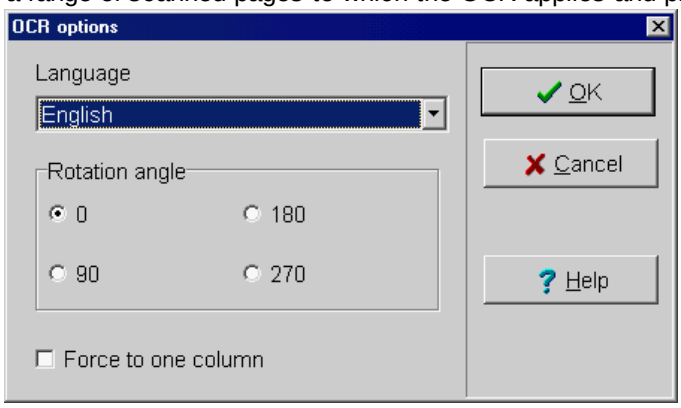
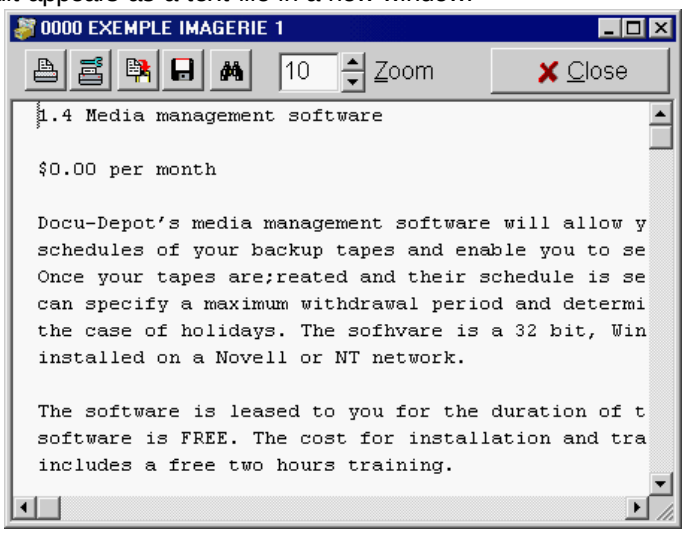


3. Enter a range of scanned pages to which the OCR applies and press **OK**. A window is displayed.



4. Select a language for the recognition and a rotation angle for the images, if necessary (when images are not scanned in a position that allows a direct reading on the screen they must be reoriented). Press **OK**.

The result appears as a text file in a new window.


0000 EXEMPLE IMAGERIE 1
10
Zoom
Close
1.4 Media management software
$0.00 per month
Docu-Depot's media management software will allow y
schedules of your backup tapes and enable you to se
Once your tapes are;reated and their schedule is se
can specify a maximum withdrawal period and determi
the case of holidays. The sofhvare is a 32 bit, Win
installed on a Novell or NT network.
The software is leased to you for the duration of t
software is FREE. The cost for installation and tra
includes a free two hours training.

5. Search, save, print, or copy and paste the text as desired.
6. Click on the **Close** of the report's window to go back to the Imaging module.

9.5.2.33.13 OCR and index

This function performs OCR on the specified image pages, and adds the text directly to the list of keywords for the image.

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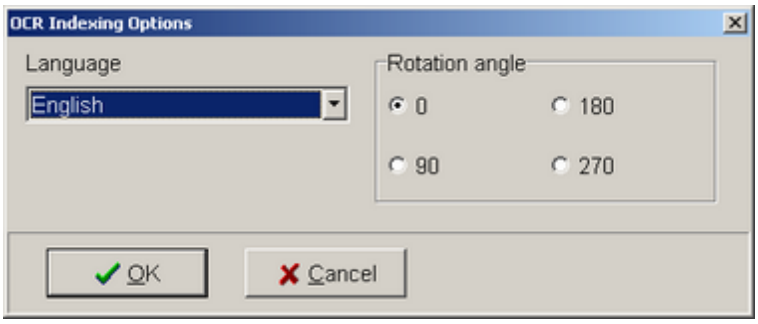
1. Open the Imaging module to the desired file. (In the **Inventory->File** module, navigate to the file, then press **Ctrl-I**).
2. Select **File->OCR and Index**.

Recognized text is added automatically to the list of keywords. You may wish to view and edit the resulting list of keywords.

9.5.2.33.14 OCR Indexing Options

1. Open the **Inventory->File** module and navigate to the correct file.
2. From the menu select **File->Imaging**, to open the imaging module.
3. From the menu of the imaging module select **File->OCR Indexing Options**. A window appears:

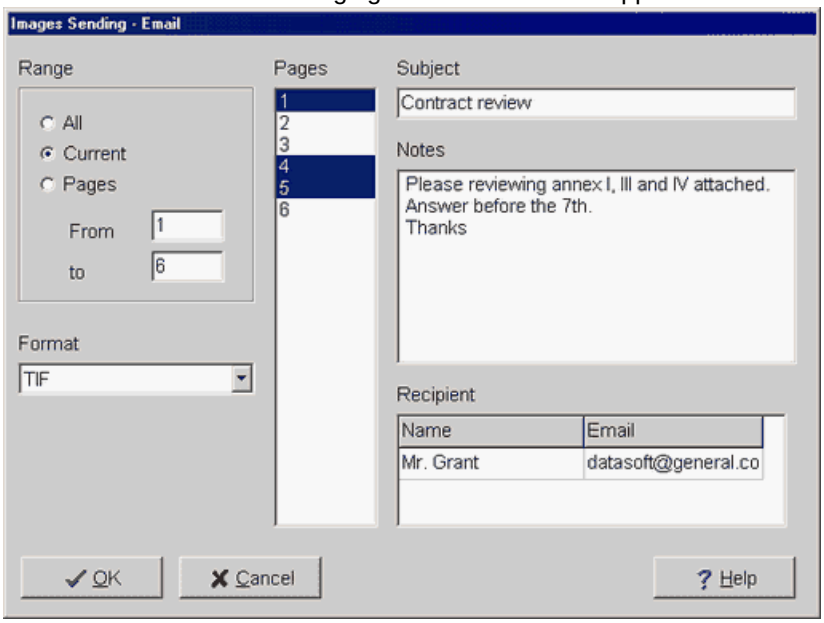


4. Modify the **language** to use or the angle through which to rotate the image prior to OCR.
5. Click **OK** when done.

9.5.2.33.15 Sending scanned images by Email

To send some or all pages of the current image by e-mail:

1. Click on **File->Email** from the Imaging module. A window appears.



2. Select the pages to be sent, and the image format to use.

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3. Choose a file format (TIF or PDF)
4. Enter one or more e-mail addresses, and an option subject and notes, then press **OK** to send images

9.5.2.33.16 Importing images

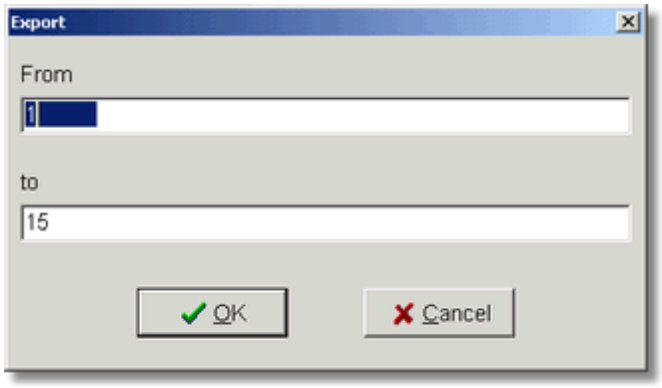
Images may be imported from the following formats : afi, bmp, dcx, pcc, pcx, pdf, jpeg, jpg, pbm, pgm, png, ppm, tga, tif, tiff, and vst.

1. Click on **File->Import** from the Imaging module. A browsing window appears, different for each computer.
2. Locate and select the image file and click the **Open** button..
3. The images will be added to the current EDC file record, and will be displayed on the screen. They can then be edited and saved.

Note: If the imported image is of the PDF format, you will be prompted to select a color format before saving. Options include black and white, grey scale, or color. You may be prompted to run EdcView.exe if it has not previously been run on your computer.

9.5.2.33.17 Exporting images

To export images from a single file:
1. Click on **File->Export** from the Imaging module. A window appears.



2. Enter an interval of images to export and press **OK**. A window is displayed, different for each computer.
3. Select the directory to which the images will be exported, enter a name for the file and click on the **Save** button. The exportation will be automatically performed and the system will come back to the Imaging module's window.

Images for multiple files may be exported simultaneously[277] through the Customer->Customer Information module.

9.5.2.33.18 Copying or pasting images

Copy a scanned image from the current file to clipboard

1. Keep on the screen the desired scanned image and click on **Edit->Copy Image**.
2. This image can now be pasted into another application by pressing **Ctrl-V**.

Paste a new image from the clipboard into the current file

1. Capture or copy any image from any other location than EDC with an appropriate software.
2. Open the File module, search for the desired file and open the Imaging module.
3. Click on **Edit->Paste New Image**. A window appears.

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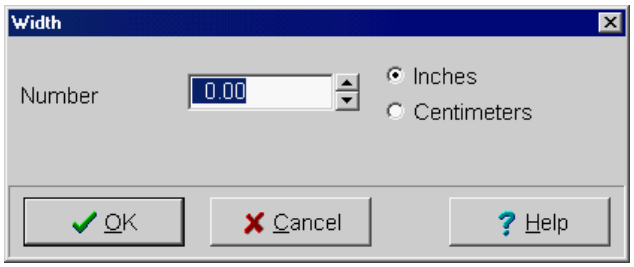


4. Enter a width for the new image (either inches or centimeters) and press **OK**. The new image is automatically added to the current file. Do not forget to save this image when exiting the Imaging module.

9.5.2.33.19 Viewing an image

When viewing an image it is possible to adjust the size on the screen. It is also possible to smooth black and white bitmap images.

Smoothing out a black and white image

1. From the menu of the imaging module, click on **View -> Anti aliasing**.

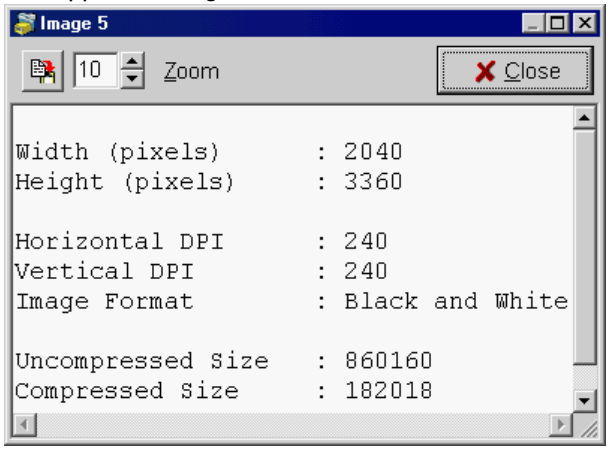
Note: This applies to black and white bmp format images.

Changing the size of the image

1. Click on **View -> Actual Size | Fit width | Fit height | Full page**, or enter a zoom in the drop-down box on the toolbar.

9.5.2.33.20 Viewing the information of an image

1. Click on **View->Image Information** from the Imaging module.
2. A window appears and gives information about the current image.



3. Click on the **Close** button to terminate the action.

9.5.2.34 Password protecting an image for the web

Passwords for accessing images in ActiveFile and on ActiveWeb can be assigned at the file level.

1. In the **Inventory->File** module, navigate to the appropriate file.
2. From the menu, select **Edit->Set master image password**. (or press **Ctrl-M**)

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Note: To grant an employee access to this option, they will require rights[340] to the Content Access Management module, either through their user groups or as an additional module.

9.5.3 Search

9.5.3.1 Overview (Search)

This Search module enables you to find boxes and files based on combinations of criteria. Search results can be edited and used to produce custom reports. The edit search[487] allows you to open the box or file modules directly to a record, providing a convenient method for editing the records for a list of specific boxes.

The functionality of this module is also used by the Orders->Order module in selecting boxes using box or file searches.

Available reports

- list of Boxes | Files found with search criteria, ordered by number, description, entry date, disposal date, start date, end date, old box number (box only), owner, original location (box only), field 1, field 2, or field 3

Fields (none)

Tasks

- Searching for boxes or files[486]
- Modifying the search result list[486]
- Opening box or file records from search result lists[486]
- Viewing or printing search results[489]
- Editing the report options for search results[489]

Distinctive menu options:

Search menu

- Box | File search[486]
- Edit Box | File search[487]

Module window:

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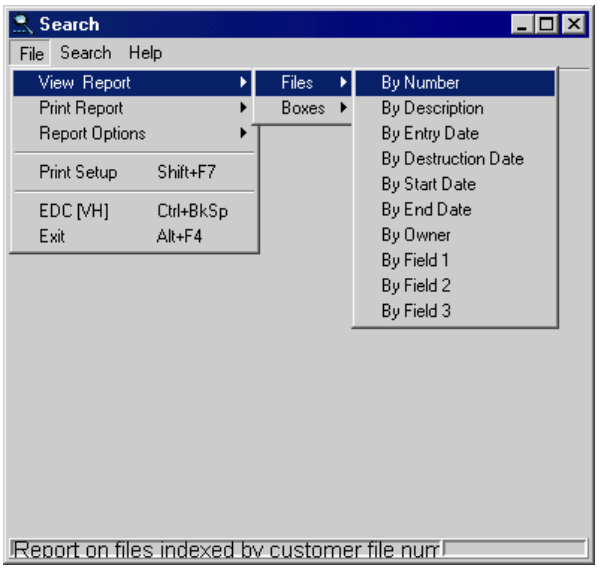
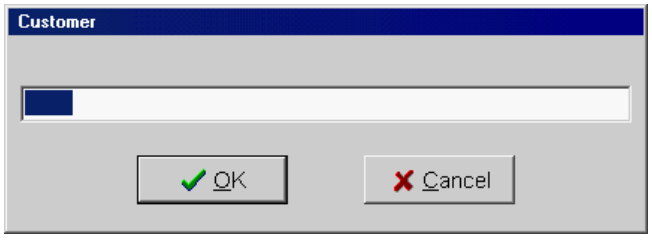
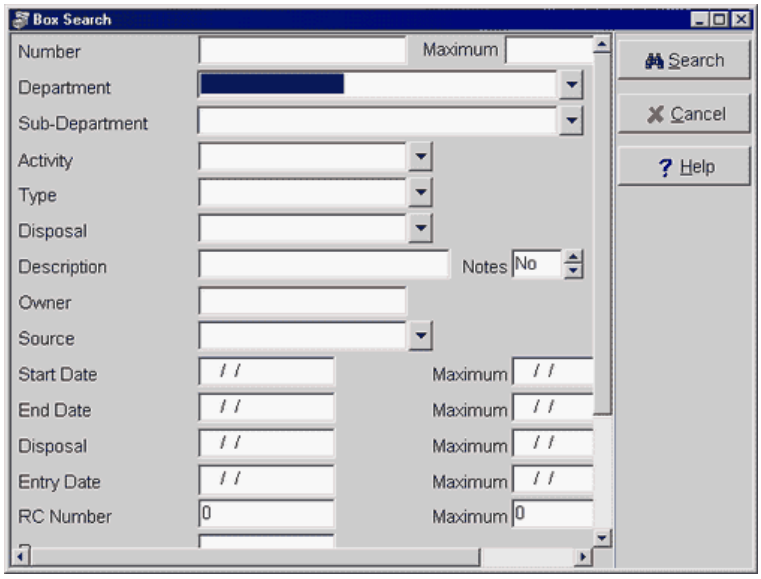


9.5.3.2 Searching for boxes or files

1 Click on **Inventory**->**Search** from the Main window.
2 Click on **Search**->**Box Search**|**File Search**. A window is displayed.



3 Enter the code of the desired customer and press **OK**. A new window appears.



Note : When entering a search criterion, the information must be the exact match of what it is looked

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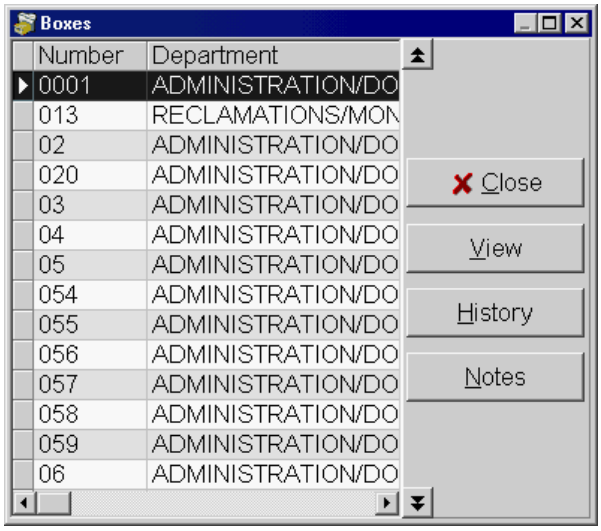
for (except for the Description and Notes fields). A search operation will find all boxes or files containing the specified search criteria. When entering several filters simultaneously, the search result will include only the records containing all the filters.

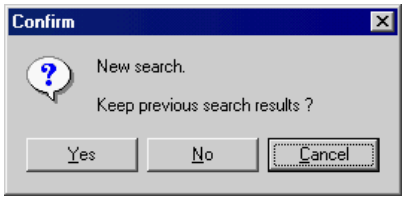
In the case of Notes (if its value is set to "yes") and Description fields, any character string to look for can be entered. The system will explore all the contents of those fields and return those containing the specified character string. For example, searching for "Mont" in the Description field, will give a search result that include all boxes or files containing "Montreal", Montana", "Month" in that field.

4 Enter the elements searched for in the appropriate fields (they are the fields of the Box and File modules) and click on the **Search** button. The report's window appears.



5 Select an item and click on the **View**, **History** or **Notes** button, respectively to view the details of the time, its history and notes.

6 Click on the **Close** button to go back into the module and be able to perform another search. A dialog box appears.



7 Perform one of the following actions :

- Click on the **Yes** button to start a new search keeping the previous search criteria.
- Click on the **No** button to start a new search canceling previous search criteria.
- Click on the **Cancel** button to go back to the module's window and to access the detailed search report.

9.5.3.3 Adding or removing boxes or files from search results

Box and file searches produce lists of results that you can use to generate custom reports[489] or work on a series of related items.

1. In the **Inventory->Search** module, perform a box or file search (see the previous section[486]).

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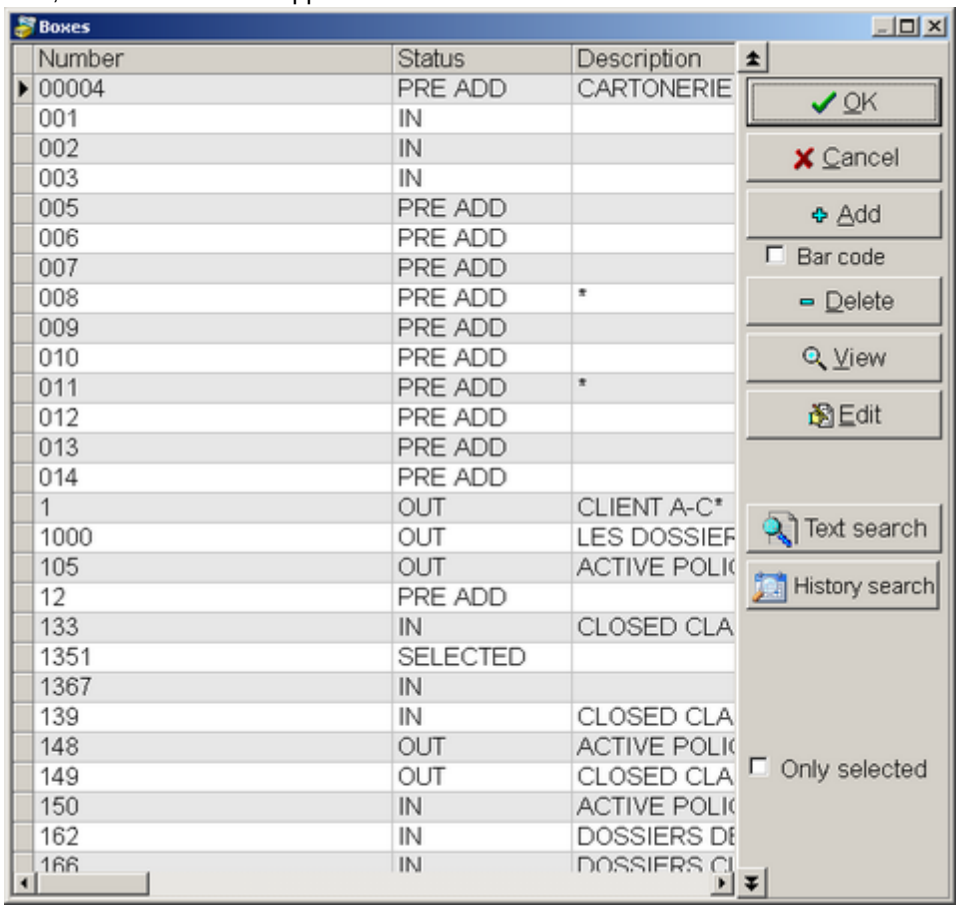
2. From the menu, select **Search->Edit Box|File Search**.
3. If no search has been performed, you will be prompted to enter a customer or select a customer key.
4. Otherwise, the window which appears will contain search results.



To add items:

- Click on the **Add** button. (If the Bar code box is checked, you will be prompted to scan the item's bar code. Otherwise, enter a number or description, highlight the desired items, and click **Accept**.)

To remove items from the list:

- Select the desired items and click on the **Delete** button.

To view a summary report of an item:

- Select the desired items and click on the **View** button.

To open the box or file module to an item on the list:

- Select the desired items and click on the **Edit** button.

To add items with a Full Text search:

- Click on the **Text Search** button.
- Perform the search[499]
- Select an item and click **OK**. It will be added to the list.

To add items with a History search:

- Click on the **History search** button.

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- Select the date range and activities[533] to include.
- Click **OK**. Items meeting the specified criteria will be added to the list.

To limit the list to selected items:

- Highlight items on the list to keep.
- Check the Only Selected box.
- Click the **OK** button. You will be returned to the module window.
- If you wish to continue modifying the list, select **Search->Edit Box|File Search** from the menu again.

5. When done, click the **OK** button to accept modifications to the list.

9.5.3.4 Viewing or printing search results

1. In the **Inventory->Search** module, select **Search->Box | File Search** to perform a search[455].
2. Click the **Cancel** button when done, to avoid performing a subsequent search.
3. Optionally, modify the search results[487] using **Search->Edit Box | File Search**.
4. From the menu, select **File->View Report|Print Report->Files|Boxes** and select the sort order.

9.5.3.5 Editing the report options for search results

When producing search results, it is possible to choose the desired pre-defined report and to modify the information that will be displayed. These modifications are not saved in the system and are lost as soon as the Search module is closed.

Before viewing or printing search results (when the default report is not used) it is first necessary to choose a pre-defined report. A different report can be selected and modified for each search.

1 Click on **Inventory**->**Search** from the Main window.
2 Click on **File**->**Report Options**->**Box**|**File**->**Select Predefined Box Report**|**Select Predefined File Report** . A list appears and displays all the reports pre-defined in the system.
3 Select the desired report (it will appear highlighted) and press **OK**. The system goes back to the module's window.
4 Click on **File**->**Report Options**->**Box**|**File**->**Modify Box Report Fields**|**Modify File Report Fields**. A window is displayed.

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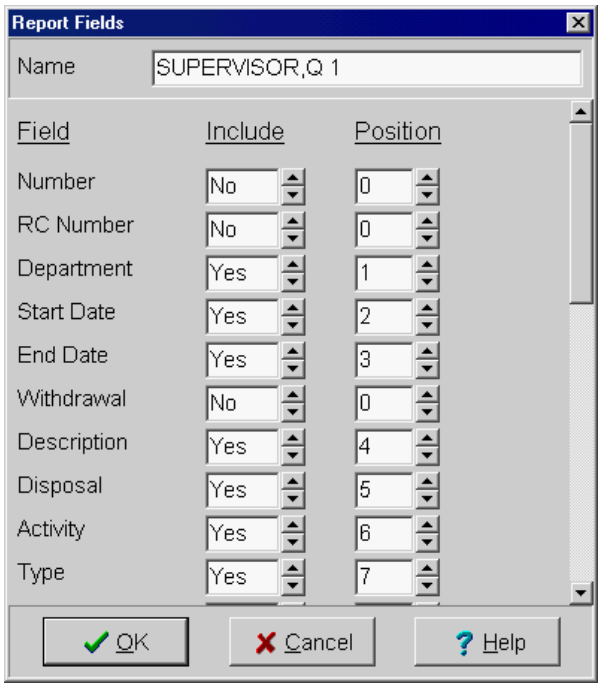

5 Click on the choice buttons of the Include column and set the desired fields to "Yes" or "No" if these fields must appear or not on the report. For all the fields that are set to "Yes", click on the choice button in the Position column and set their display order. Press **OK** to terminate the operation.

Every search result that is viewed or printed after the current operation will only display the information chosen in **4**.

9.5.3.6 Customer search

The customer search window allows you to create a list of customers based on criteria. It is used in functions such as creating mailing lists[266], applying rate increases for multiple customers[747] and activating many customers to use the Full Text Search[272].

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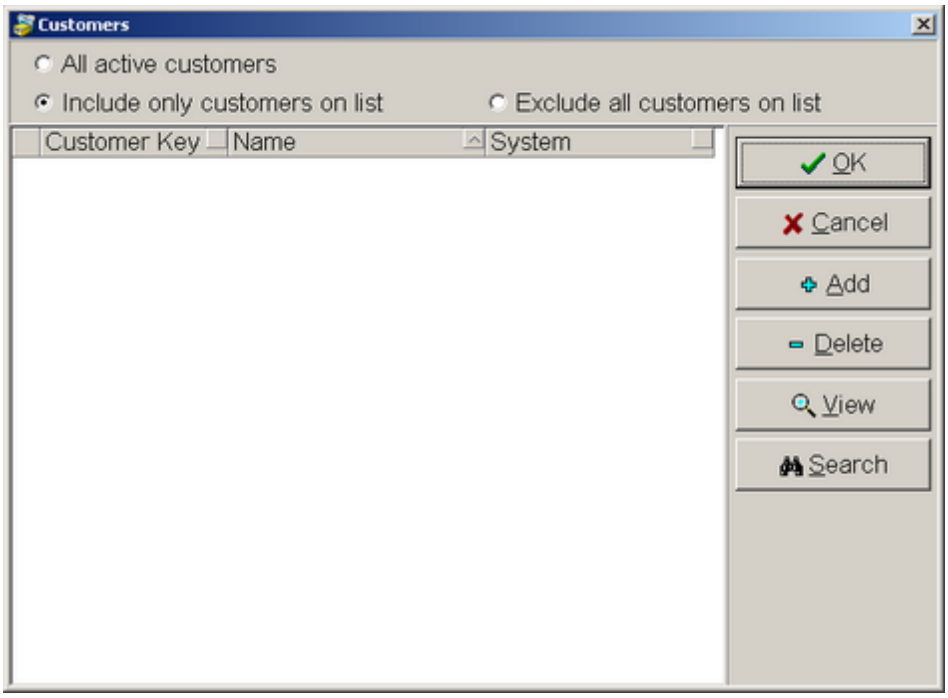
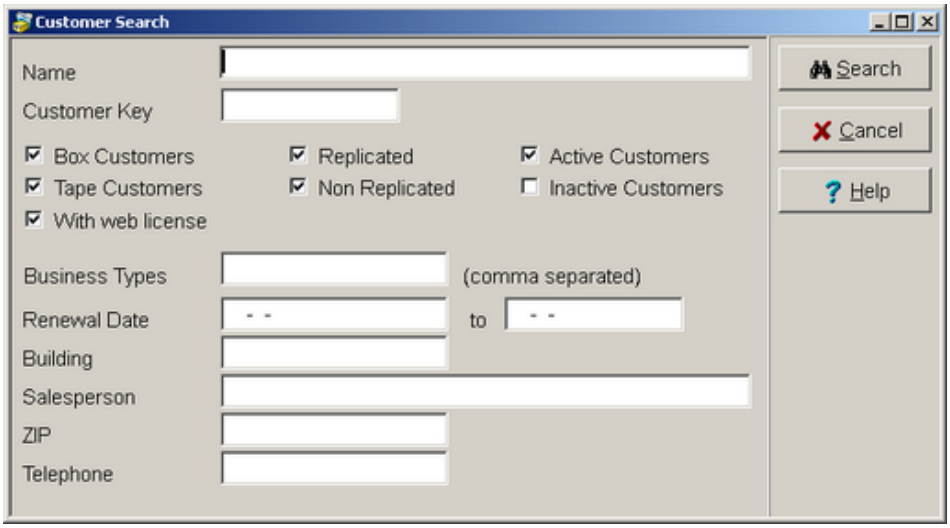


- From the Customers list window, click the **Search** button.



- Enter criteria in the fields, then click on the **Search** button to add all customers meeting all specified criteria to the list.

Fields:

Name[248], Customer Key[248], ZIP[250], Telephone[250]

Alphanumeric fields that limits results to customers whose account data in the customer information match the search string entered, starting from the left. This is not case sensitive. For example, the search string "Cli" in the Name field would return a customer by the name of "Client Demo A", but would not return a customer "Demo Client A".

Box customers | Tape customers

Limits the results based on the container type[256], which may be either tape only (tape), or box and tape (box).

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With web licenses
Limits the results to customers that have at least one user license to access ActiveWeb.

Replicated | Non Replicated
Limits the results based on the replication[256] status. This setting becomes "Yes" for customers that use EDC ActiveFile to manage their in-house records, and have their database synchronize automatically with the data at the record center.

Active customers | Inactive customers
Limits the results based on whether or not the account is active[249].

Business Types
Limits the results based on the busines type[252]. You may enter multiple values, separated by commas.

Renewal Date
Limits the results based on the date range of renewal dates[252] specified.

Building
Limits the results based on the building[353]. You may enter multiple values, separated by commas.

Salesperson
Limits the results based the salesperson[252]. You may enter multiple values, separated by commas.

9.5.3.7 Box and File searches

The box and file search windows enable you to create lists of boxes or files based on search criteria. They are used in functions such adding boxes or files to an order with a search[608], or adding boxes or files to a report with a search[487].

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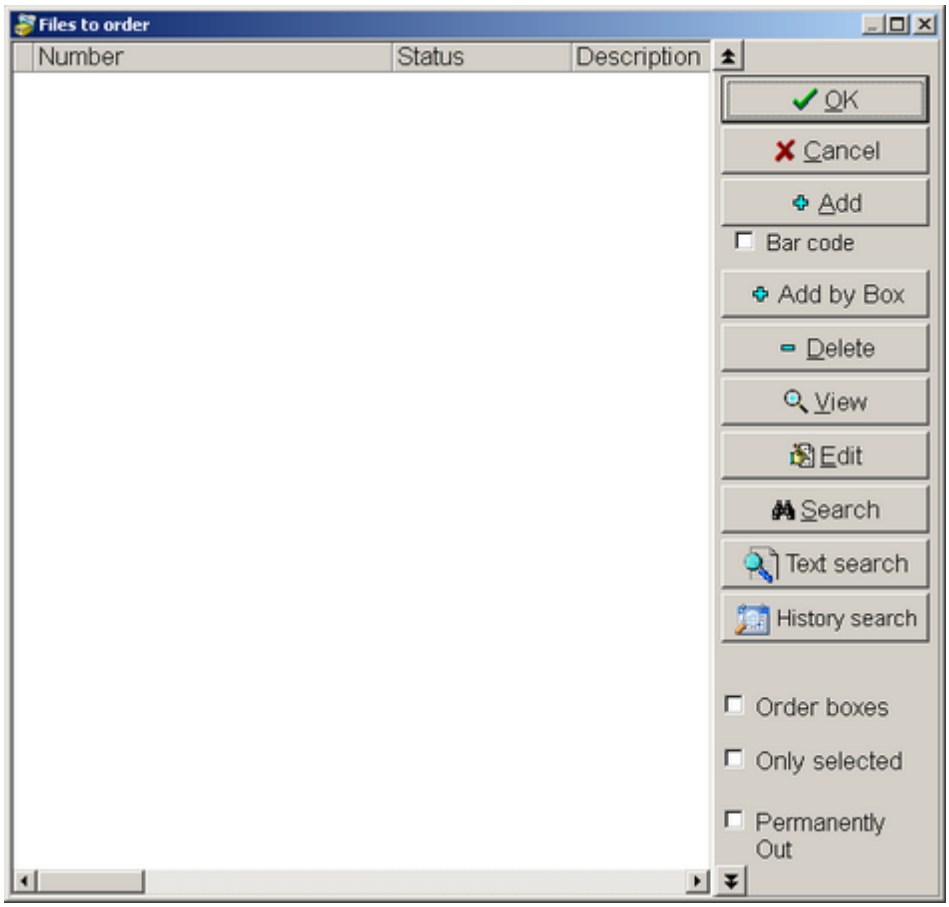

- **Ok** accepts the currently displayed list. If the **'Only selected'** box at the bottom of the window is not checked, all items displayed in the window will be used. If it is checked, only the items highlighted in black will be included in the list. (In the case of placing orders, **"Order boxes"** will cause the boxes containing the files to be ordered instead of the files themselves, and checking the **"Permanently Out"** box causes all items to be marked as "deleted" from inventory.)
- **Cancel** aborts the operation without creating a list.
- **Add** adds items by Number or description. If the **'Bar code'** box is checked, items are added by entering the bar code, typically using a bar code scanner connected to the computer for direct input.
- **Add by Box** allows you to select files or images by starting with the boxes that contain them.
- **Delete** removes the selected items from the list.
- **View** displays the details of the currently selected item.
- **Edit** opens the box or file module to the selected item.
- **Search** builds the list based on searching by parameters as in the search module[486]
- **Text search** builds a list based on a full text search[497].
- **History search** builds a list based on item activity[533] history
- **Printer** (where present) opens the printer settings dialogue box.

9.5.4 Rotation schedule

9.5.4.1 Overview (Rotation Schedule)

The tapes that many companies use for backing up their valuable information are typically rotated according to defined schedules.
This module allows the record center to create and view schedules of deliveries for these items.

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Available reports

- Tapes returned on a holiday[497]
- Tape Schedule[497]

Tasks

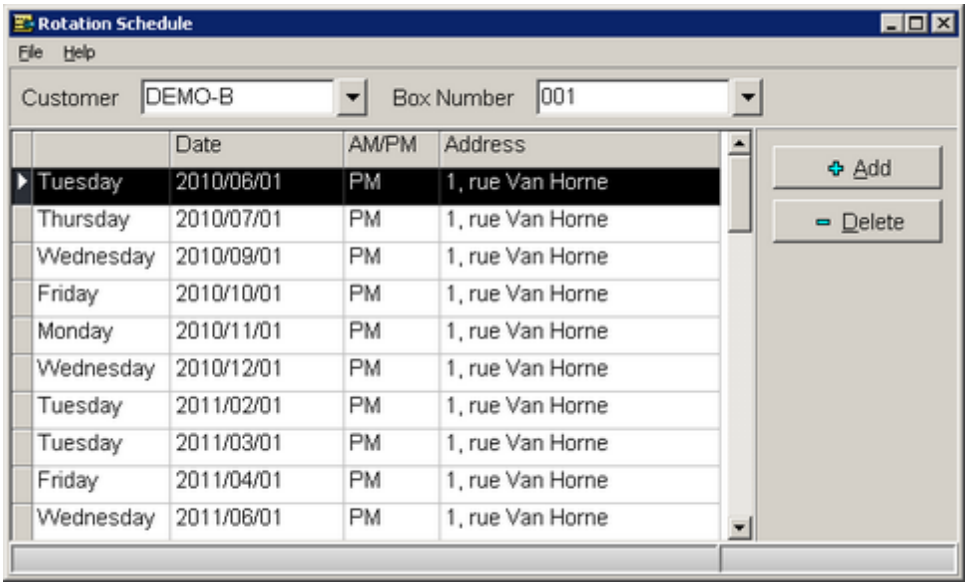
- Adding or deleting a delivery date[496]

Distinctive menu options:

File menu

- Delivery date series creation[494]
- Change delivery address[496]

Module window:


Rotation Schedule
File Help
Customer DEMO-B
Box Number 001
Date AM/PM Address
Tuesday 2010/06/01 PM 1, rue Van Horne
Thursday 2010/07/01 PM 1, rue Van Horne
Wednesday 2010/09/01 PM 1, rue Van Horne
Friday 2010/10/01 PM 1, rue Van Horne
Monday 2010/11/01 PM 1, rue Van Horne
Wednesday 2010/12/01 PM 1, rue Van Horne
Tuesday 2011/02/01 PM 1, rue Van Horne
Tuesday 2011/03/01 PM 1, rue Van Horne
Friday 2011/04/01 PM 1, rue Van Horne
Wednesday 2011/06/01 PM 1, rue Van Horne
Add
Delete

Note:

- A customer must have a web license that includes Rotation in order to make use of this function.
- Many record centers use ActiveWeb instead of this module to enter rotation schedules on behalf of the customer.
- The system attempts to create orders for tape rotation when picking is performed during the appropriate picking cycle - i.e. starting one hour after the previous cut-off time, up until the cut-off time for the current cycle.
- Because creation of rotation orders is triggered by the creation of picking lists, it is important to create a picking list[622] every cycle (day or half-day), even if no external orders have been placed.

9.5.4.2 Creating a rotation schedule

To create a rotation schedule in EDC RC:

1. Open the **Inventory->Rotation Schedule** module

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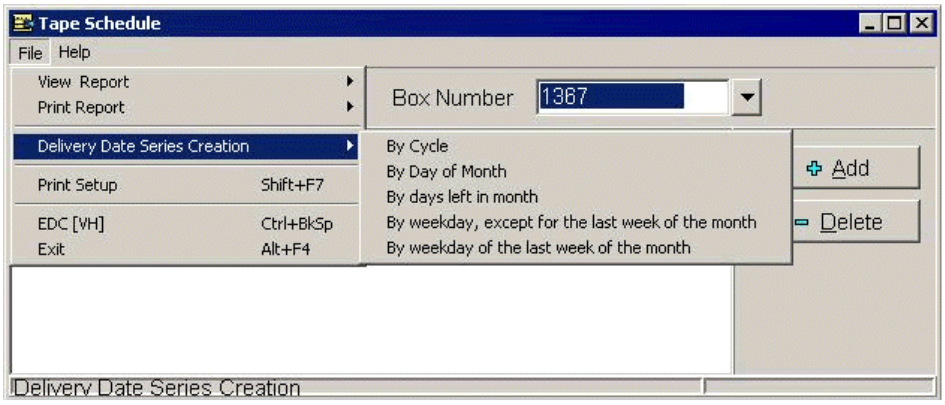
2. Select a customer in the drop down field at the left of the window (to have the list of customers press **OK** in the customer window)
3. Select a box number in the drop down field at the right of the window (to have the list of boxes press **OK**)
4. From the menu, select **File->Delivery Date Series Creation**
5. Select a type (by cycle, by day of month, by days left in a month, by weekday except for the last week of the month or by weekday of the last week of the month)



If you have chosen the delivery by cycle :

1. Choose a start date for the deliveries
2. Choose the number of days you want the cycle to be repeated
3. Choose the end date of the deliveries
4. Select a delivery address in the list (it will appear highlighted) and press **OK**

If you have chosen the delivery by day of the month :

1. Choose a start date for the deliveries
2. Choose the day you want the tapes delivered (ex: for the fifteenth write 15)
3. Choose the end date of the deliveries
4. Select a delivery address and press **OK**

If you have chosen the delivery by days left in the month :

1 Choose a start date for the deliveries
2 Choose the number of days before the end of the month
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

If you have chosen the delivery by weekday, except for the last week of the month :

1 Choose a start date for the deliveries
2 Choose the weekday you want the tapes delivered
3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

If you have chosen the delivery by weekday of the last week of the month:

1 Choose a start date for the deliveries
2 Choose the weekday you want the tapes delivered

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3 Choose the end date of the deliveries
4 Select a delivery address and press **OK**

Example: If you want the tape to return every Friday you would:

1 Go in **Tape schedule->Delivery Date Series Creation -> By Cycle**
2 Choose a start date (on a Friday)
3 Choose a number of days (7)
4 Choose any end date
5 Select a delivery address and press **OK**

Note: If there are any invalid dates, a report of errors will appear in the window. When this happens one either changes certain dates or leaves the delivery list unchanged.

To use the Tape schedule, a delivery type[725] with the following parameters must be available:
Ship mode - By date
Courier - Record center
Order - Put it first in the list (see the Ordering[725] field of the Delivery Type module).

9.5.4.3 Adding or deleting a delivery date

To add a delivery date

1 Click on **Inventory - > Rotation Schedule** from the Main window
2 Select a customer in the drop down field at the left of the window (to have the list of customers press **OK** in the customer window)
3 Press on the drop down button of the box field, enter a box number or press **OK** to have the list of boxes.
4 Click on the **Add** button
5 Choose a delivery date
6 Select a delivery address and press **OK**

To delete a delivery date

1 Click on **Inventory - > Rotation Schedule** from the Main window
2 Select a customer in the drop down field at the left of the window (to have the list of customers press **OK** in the customer window)
3 Press on the drop down button of the box field, enter a box number or press **OK** to have the list of boxes.
4 Select the date you want to delete (the date should appear highlighted)
5 Click on the **Delete** button

9.5.4.4 Changing a delivery address for tape rotation

To change a delivery address for a tape rotation

1. Open the **Inventory - > Rotation Schedule** module.
2. Select a customer in the drop down field at the left of the window (to have the list of customers press **OK** in the customer window)

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3. Press on the drop down button of the box field, enter a box number or press **OK** to have the list of boxes.
4. From the menus, select **File->Change Delivery Address**
5. Click **Yes**, then select the new delivery address. The address for the remaining deliveries of this tape will be updated

9.5.4.5 Viewing or printing tapes returned on a holiday

1. Click on **Inventory - > Rotation Schedule** from the Main window
2. Go in **File -> View | Print report -> Tapes returned on a holiday**
3. The list of all tapes (sorted by customer) returned on a holiday will be automatically displayed or printed

9.5.4.6 Viewing or printing the tape schedule of a customer

1 Click on **Inventory -> Tape schedule** from the Main window
2 Go in **File -> View | Print report -> Tape schedule**
3 Enter the customer key (to have the list of customers press **OK** in the customer window and select a customer)
4 Enter a date range
5 The list of all delivery dates for this customer will be automatically displayed or printed

9.5.5 Full Text Search

9.5.5.1 Overview (Full Text Search)

The Inventory->Full Text Search module can be used to locate records that contain specific words somewhere in unspecified text fields. From the search results, it is possible to view details of a record or open to it in the box or file module.

Available reports

- list of boxes found with search criteria
- list of files found with search criteria

(**Note:** For reports it is more convenient to use the Inventory->Search[485] module, which has full-text search capabilities in the Search->Edit box | File Search[487] function.)

Fields[498] (see the next section)

Tasks

- Performing a search [499]
- Viewing or printing a list of boxes found with search criteria[500]
- Viewing or printing a list of files found with search criteria[500]

Distinctive menu options:

File menu

- Report options[489]
- Change customer[499]

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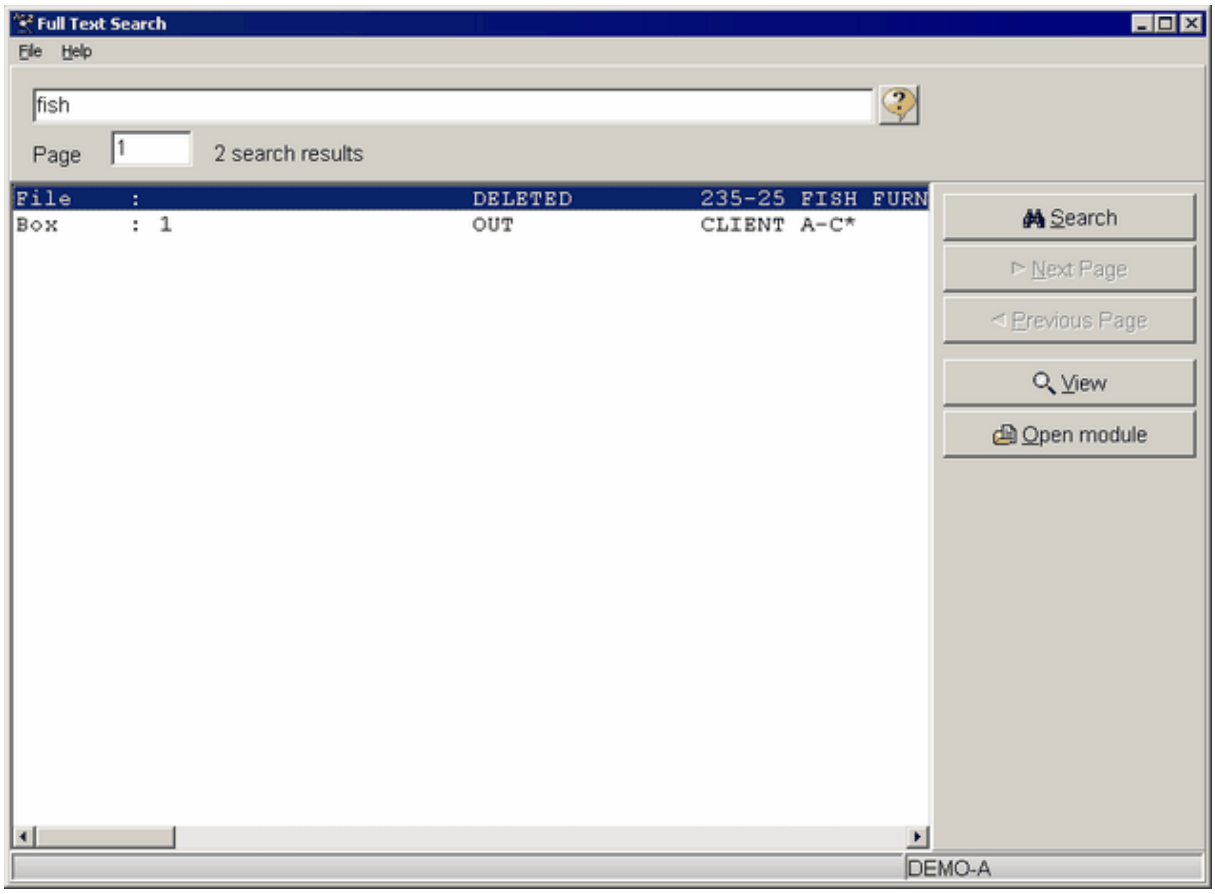
Module window:



9.5.5.2 Fields (Full Text Search)

Search text

The full text search engine has been replaced to make both indexing and searching much faster and to permit more powerful and intuitive searches.

To perform a full text search, Enter words, characters, or expressions to be found in any text field, including descriptions, notes, and user-defined fields.

- The search is not case sensitive
- To find an exact phrase, use double quotes. Example: "the quick brown fox"
- To exclude a term, use the "-" sign. Example: -difficult
- To find records that have 2 terms close to each other (proximity search), use the NEAR operator. The default is within 10 terns. To find records that have the word A separated by 5 or less words from B, try
- A NEAR/5 B.
- When the search contains multiple words, the default is AND. For example, searching for A B will find records that contain both terms.
- If you wish to identify records that contain either term, use the OR operator. Eg: A OR B
- Search operators such as "OR" and "NEAR" must be capitalized, or else they will be treated as search terms.

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Information button
Clicking this button will display an explanation of how to construct search expressions

Page
Indicates the page number currently being displayed, from within the search results.
The number of results is displayed to the right.

Results
Zone where search results are displayed.

Search
Click this button to perform the search

Next/Previous Page
Click these buttons to navigate within multiple pages of search results.

View
Highlighting the desired record within the search results and clicking this button will display summary information for the selected record.

Open module
Highlighting the desired record within the search results and clicking this button will bring you to the selected record in the box or file module.

Note: See "Setting up a client to use the Full Text Search at RC[126] " .

9.5.5.3 Performing a search

1. Open the **Inventory -> Full Text Search** module.
2. Select a customer (to have the list of customers press **OK** in the customer window). (To change customers, select **File->Change customer**.)
3. Enter the search text in the field at the top of the window (see the previous topic[498] for details)

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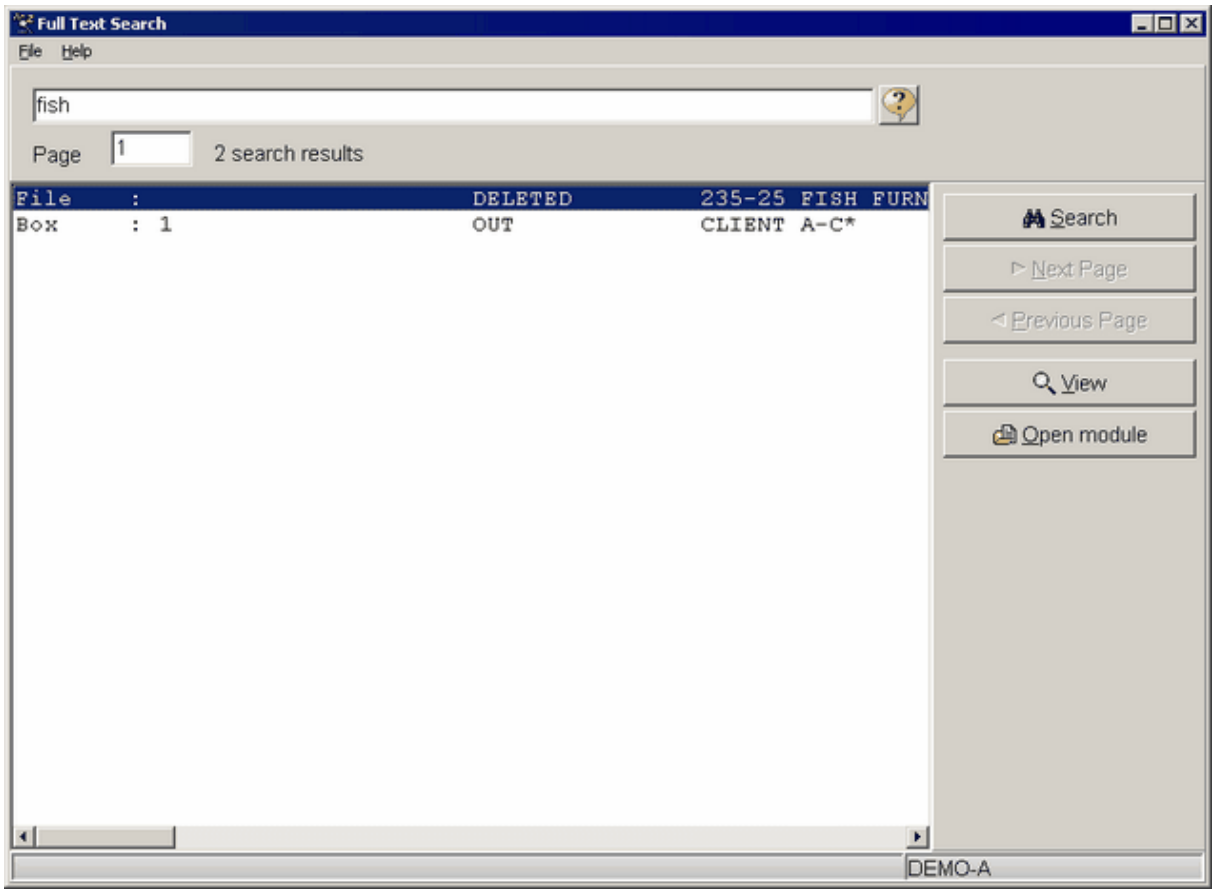

4. Press the **Search** button to begin the search.
5. To view details of a result, highlight the result press the **View** button.
6. To open the Box or File module to a result, highlight the result and click the **Open module** button.

9.5.5.4 Viewing or printing Full Text Search results

Note: The Inventory->Search[485] module is more flexible for reporting purposes and has full-text search capabilities through the Search->Edit box | File Search[487] function.)

1. Perform a Full Text Search[499]
2. Click on **File->Report Options->Box|File** and choose a predefined report or modify report fields if desired.
3. Click on **File->View Report|Print Report->Files|Boxes**. The chosen report will be printed or displayed soon after. Click on the **Close** button of the report's window to end the viewing.

Note : Only the search results that have been viewed before are displayed in these reports. If the report is produced right after performing the search and without clicking on the **Next Page** button, only items included in the first page of result are displayed on the report.

9.5.5.5 List of separating characters

Characters in the following list are treated as spaces separating words:

. , : ; ` ' ' " " ¨ ~ · « » ( ) < >
[ ] { } ¦ | ? ¿ ! ¡ + ± ^ ¸ & @ *

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® ¶ ¤ ° $ ¢ £ ¥ % ¾ ½ º ¹ ² ³ ª

9.5.6 Report (SQL)

9.5.6.1 Overview (Report SQL)

The Inventory->Report module enables record centers to import, view, modify, and create reports on various data in EDC RC. A tutorial is available at ftp://docudatasoft.com/EDC/common/Learning_Report_Builder/

Tasks

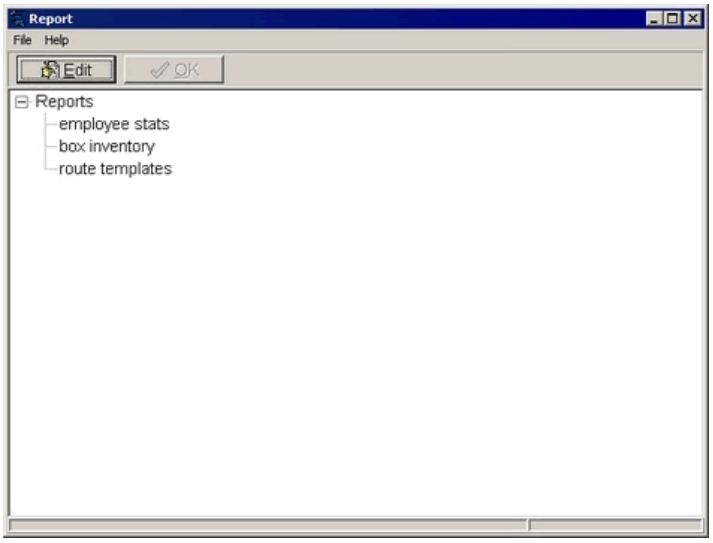
- Working with reports (adding, editing, importing, etc.) 501
- Customizing imported reports 504
- Working with the Design tab 505
- Working with the Data tab 509

Distinctive menu options:

File menu

- Import 501

Module window:



9.5.6.2 Working with reports

***Adding and Importing a report**

1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 To add a new report to a folder, select the folder (ex:Reports) and it will appear highlighted.
4 Right-click on it with your mouse and select Add a child from the menu.

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5 A window appears. Enter the new report's name and press **OK**.
6 Double-click on your new report to open it.
7 Click on **File->Import**. A window appears (the window is different for each computer).
8 Select a report (it will appear highlighted) and press **Open**
9 Perform small changes (at least one)*
10 To save the report, click on **File->Close**
11 A message appears: "Save the changes".Press Yes to save the changes.
12 When all is done, press **OK**.

*If no changes are performed, the report cannot be saved.

Editing a report

1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Perform the changes needed
5 To save the report, click on **File->Close**
6 A message appears: "Save the changes".Press Yes to save the changes.
7 When all is done, press **OK**.

Renaming a report

1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select Rename from the menu.
5 A window appears. Enter a new name for the report and press **OK**.
6 When all is done, press **OK**.

***Editing the access rights of a report**

1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select Access rights from the menu.
5 A window appears.

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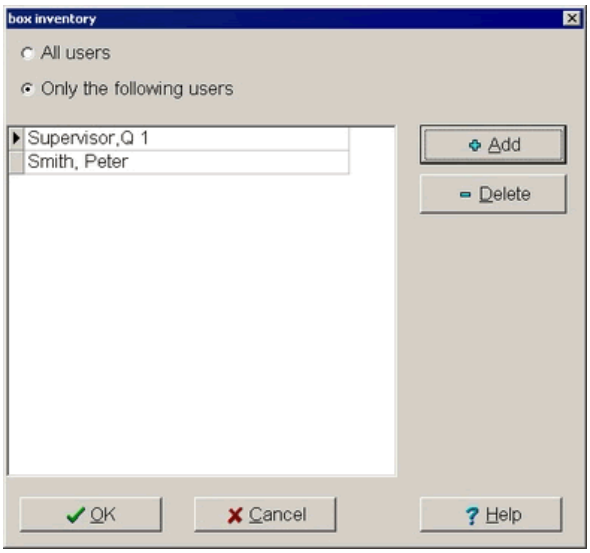

5 To make this report available to all users, select the All users option.
6 To make this report available to a few users, select the Only the following users option.
7 To add users, click on the **Add** button. A list of users will appear. Select the desired users (they will appear highlighted) and press **OK**. They will automatically appear on the list.
8 To delete users, select the desired users from the list (they will appear highlighted) and press the **Delete** button.
9 When all the changes have been made, press **OK**.
10 When all is done, press **OK**.

Deleting a report

1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 Select the report (it will appear highlighted).
4 Right-click on it with your mouse and select Delete from the menu.
5 A message appears: " Permanently delete (report's name) and all its children ? Related information will be deleted."
6 Press Yes to delete the report, No or Cancel to abort the operation.
7 When all is done, press **OK**.

Previewing a report

1 Click on **Inventory**->**Report** from the Main Window.
2 Select the report (it will appear highlighted).
3 Right-click on it with your mouse and select Report.
4 To preview the report, click on the Preview tab.
5 Depending on the chosen report, some fields might be making references to the different activity codes (ex: the codes for the box activities or the delivery activities.) To understand all the different activity codes, see the Activity codes 773 chapter of the Appendix.

Printing a report

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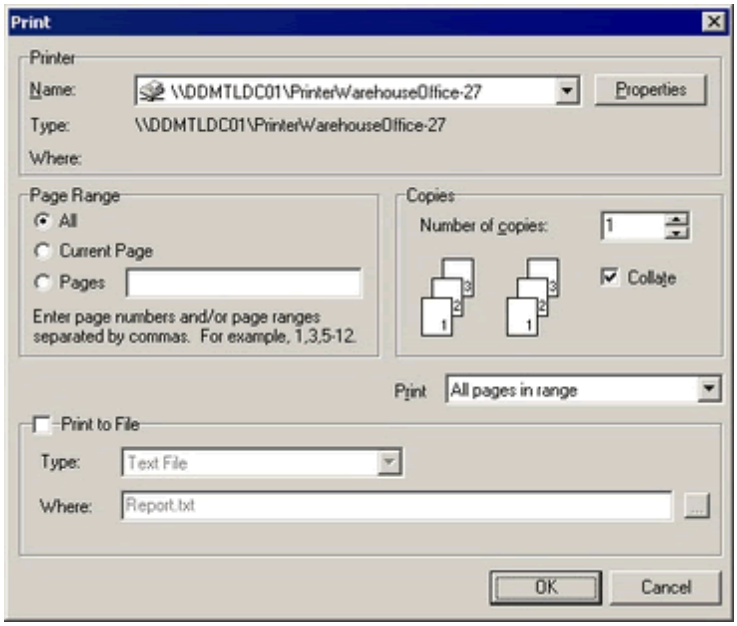
1 Click on **Inventory**->**Report** from the Main Window.
2 Select the report (it will appear highlighted).
3 Right-click on it with your mouse and select Report.
4 Before printing a report it would be better to preview it (to preview the report, click on the Preview tab.)

5 If printing from the Preview tab, click on the **Print** icon . If printing from the Design or the Data tab, click on **File -> Print**. A window appears.



6 Select a printer, a page range, a number of copies. If the print to file option is checked off, select a file type in the drop-down list. Click on the **Browse** button to specify a file name and the repertory where it will be saved.
7 Press **OK**

For all subsequent report topics, assume that the Report module has already been opened and that a new report has already been created.

9.5.6.3 Customizing an imported report

Specifying a customer
Using the Search Data icon

1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Preview** tab.
5 Click on the **Search Data** icon
6 Enter the CustNo[825] or the CustKey[825] in the appropriate field.
7 Press **OK**

In the Data tab

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1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Data** tab.
5 Select the master data view that includes the field called CustNo[825] or CustKey[825].
6 Click on the **Search** icon
7 Enter a value in the value column beside the CustNo[825] or the CustKey[825] field.

Note: This option is only available if one has rights to edit a report. When the CustKey[825] is selected, the value entered is case sensitive.

Specifying a date range
Using the Search Data icon

1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Preview** tab.
5 Click on the **Search Data** icon
6 Enter the date in the appropriate fields.
7 Press **OK**

In the Data tab

1 Click on **Inventory**->**Report** from the Main Window.
2 Click on the **Edit** button
3 Double-click on the report to open it.
4 Click on the **Data** tab.
5 Select the master data view that includes the field that specifies the word Date (ex: DeliveryDate, HxDate, OrderDate, etc.)
6 Click on the **Search** icon
7 Enter the date in the value column beside the selected "date" field.

Note: When specifying a date range, one must be certain that the dates entered corresponds to the date mask specified in the System Information[365] module.

9.5.6.4 Working with the Design tab

All the following operations are available when opening a report in the Report module. The design tab is the default tab that will automatically appear when a report is opened.

For beginner users :
These operations are mostly used when one wants to add a few things to a report that was previously imported.

Adding text

1. Click on **Inventory->Report** from the Main Window.

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2. Click on the **Edit** button
3. Double-click on the report to open it.
4. Click on the **Design** tab.
5. Click on the **Text** icon and click on the location of your choice in the report.
6. To edit the text within the label, select the label and edit the text in the Set value field from the toolbar.

Adding a bar code

1. Click on **Inventory->Report** from the Main Window.
2. Click on the **Edit** button
3. Double-click on the report to open it.
4. Click on the **Design** tab.
5. Click on the **Bar Code** icon and click on the location of your choice in the report.
6. To edit the text within the label, select the label and edit the text in the Set value field from the toolbar.

Note: To choose the type of bar code, right-click on the bar code and click on the Configure menu item. The type that is usually recommended is Code 128 since it includes a check digit that can be read by the PDT. Make sure that the AutoSize and the AutoSize Font options in the right-click menu are disabled.

Adding a system variable

A component that allows you to display the page number, time, date, and other useful information.

1. Click on **Inventory->Report** from the Main Window.
2. Click on the **Edit** button
3. Double-click on the report to open it.
4. Click on the **Design** tab.
5. Click on the System Variable icon and click on the location of your choice in the report.
6. To edit the variable, select the label and select a type in the Variable Type field from the toolbar.

Adding a memo

Prints multiple lines of plain text in a report

1. Click on **Inventory->Report** from the Main Window.
2. Click on the **Edit** button
3. Double-click on the report to open it.
4. Click on the **Design** tab.
5. Click on the Memo icon and click on the location of your choice in the report (normally it is in the detail section).
6. To edit the text within the label, select the label and edit the text in the Set value field from the toolbar.

Adding rich text

A component that allows you to print formatted text.

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.
4. Click on the Design tab.
5. Click on the Rich Text icon and click on the location of your choice in the report.

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Adding an image

Displays graphics such as bitmaps, GIFs, and JPEGs.

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.
4. Click on the Design tab.
5. Click on the Image icon and click on the location of your choice in the report.

Adding a shape

Displays various shapes, such as squares, rectangles, circles, and ellipses. Use the Shape Type field to select the shape.

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.
4. Click on the Design tab.
5. Click on the Shape icon and click on the location of your choice in the report.

Adding a line

Displays a line. Use the Line Types field to set the line orientation.

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.
4. Click on the Design tab.
5. Click on the Line icon and click on the location of your choice in the report.

Adding a region

A region logically groups components together. This is normally used for layout purposes.

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.
4. Click on the Design tab.
5. Click on the Region icon and click on the location of your choice in the report (normally it is in the detail section).

For advanced users:

These operations are mostly used when creating a new report. This section is for people that have a very good comprehension of the concept of a database. These procedures imply linking fields from the design tab to fields from the data tab.

Changing the query time-out length

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.
4. Click on the Design tab.

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5. From the menu, select File->Query Time Out.
6. Enter a value in seconds, and click OK.

Adding items from the query

DBCalculation

Performs simple database calculations (Sum, Min, Max, Average, Count).

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.
4. Click on the Design tab.

The Database Components toolbar has 4 buttons, DBText, DBMemo, DBCalculation, and DBBarcode.

5. Click on the icon of your choice, then where you wish to locate it on your report. (it is often in the detail section).
6. Select a Data Pipeline and a Data field from the toolbar.

- DBtext: When linked to a field in the Data tab, will display a single line of text.
- DBMemo: When linked to a field in the Data tab, will display the content of a notes or memo field. It can expand to accommodate multiple lines.
- DBCalculation: Performs simple database calculations. To specify a calculation: right-click on the selected calculation and click on the Calculations menu item. Select a calculation in the Calc Type field and select a group in Reset Group field.
- DBBarcode: Converts the data from a database field to a bar code symbol.

Adding a sub-report

A sub report is used when a relationship of one to many is present - this kind of relationship can also be called master detail relationship, it's when for example an order is associated to many order items or when a box is associated to many notes. Many sub-reports can be included in the same report.

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.
4. Click on the Design tab.
5. Click on the Sub Report icon and click on the location of your choice in the report (normally it is in the detail section).
6. Select a Data Pipeline from the toolbar.

Adding a group

A group is used to gather information that is similar in order to separate it from the other data. Groups are usually used to facilitate the sorting and the calculation of certain fields. For example one could group a report by department in order to start a new page every time a new department appears in the data. Another example would be to facilitate the calculation of totals for every price code encountered.

1. Click on Inventory->Report from the Main Window.
2. Click on the Edit button
3. Double-click on the report to open it.

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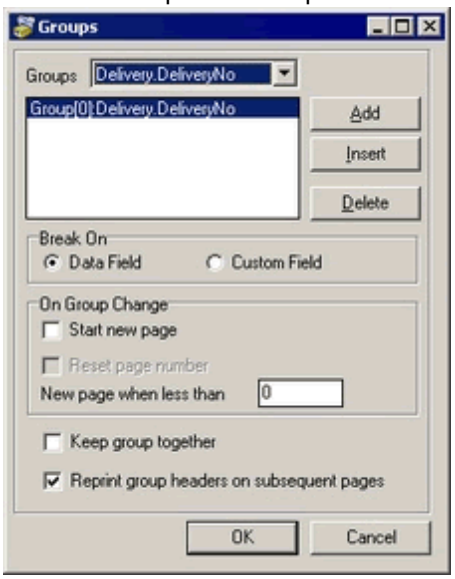
4. Click on the Design tab.
5. Click on Report -> Groups. A window appears.



6. If the Data Field field is checked off, one will be able to choose, in the drop -down list, all the fields available in the Data tab. If the Custom Field field is checked off, one will be able to choose, in the drop -down list, all the fields that have been created specifically for that report (ex: calculated fields, labels or titles, etc.)
7. To add or insert a group to the list, select it in the drop-down list (it will appear highlighted) and press the Insert or Add button.
8. To delete a group select it in the list of groups (it will appear highlighted) and press the Delete button.
9. To start a new page every time the data or custom field changes, check the Start new page check box.
10. To keep the group together in one page, check the Keep group together check box.
11. Perform all the other selections needed and press OK.

9.5.6.5 Working with the Data tab

All the following operations are available when opening a report in the Report module. The data tab is the section of the report builder that enables one to select the different fields that will be used to create the report. This section is generally for advanced users that have a very good understanding of the concept of tables as well as a thorough understanding of the way EDC functions.

Selecting a table (see also Tables[821] for more details on the different fields)

Before selecting a table, it is important to figure out what will be the master/detail relationship; in other words which table will have prominence over the other(s). For example, if one wants to create an inventory report with boxes and files, one would probably specify that the Box table would be the master and the File table the detail.

1. In the Data tab, click on **File -> New**
2. Select the Query Wizard icon and press **OK**
3. Select a table (it will appear highlighted) and press on the right arrow to send the table in the Selected tables view.
4. The table names that will appear in bold are usually related tables that can be added at the same time when using joined data views. It is better to use separated table views if one is starting to work with reports since the links between the tables are visible.

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5. Click on click on Finish or click on the Next button if you want to specify the fields, the calculations, the groups, the search option

Note: When using joined data views, different join types are available.

Options

Tables (see also Tables[821])
This tab shows all the tables available (at the top) and all the tables that are used in the report (at the bottom). To add a table to a report, double click on it's name (in the list at the top) and it should appear in the list at the bottom. To remove a table from a report, double click on it's name (in the list at the bottom) and it should disappear from the list.

Table: Table selected

Table Name: Name of the table

SQL_Alias: Name of the table in SQL

Join Type: Different join types available (to edit a join type, press on the **More** button)

- Inner Join : It discards all rows from the result table that don't have corresponding rows in both source tables.

- Full Outer Join : Retains all the unmatched rows from both source tables.

- Left Outer Join : It preserves the unmatched rows from the left table but discards the unmatched rows from the right table.

- Right Outer Join : It preserves the unmatched rows from the right table but discards the unmatched rows from the left table.

Fields (see also Tables[821])
This tab shows all the fields available (at the top) and all the fields that are used in the report (at the bottom). To add a field to a report, double click on it's name (in the list at the top) and it should appear in the list at the bottom. To remove a field from a report, double click on it's name (in the list at the bottom) and it should disappear from the list.

Calculations
This tab allows the addition of calculated fields to the report (ex: sum, count, average, maximum, minimum, expression).

Adding a normal calculation: Select a field in the list at the top (it will automatically be added to the bottom list) and select a function in the drop down list of the Function column (ex: sum, count, avg, min, max).

Sum: This calculation will do the sum of the selected field.
Count: This calculation will do the count of the selected field.
Avg: This calculation will do the average of the selected field.
Min:This calculation will show the minimum value of the selected field.
Max:This calculation will show the maximum value of the selected field.

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Adding an expression: Select a field in the list at the top (it will automatically be added to the bottom list) and select the "expression" function in the drop down list of the Function column. Enter the expression in the Expression column.

Useful expressions:

Notes fields:

GetBoxNotes(Box.CustNo, Box.BoxDDNo, MaxLength) - displays box notes, up to "MaxLength" characters.
GetFileNotes(File.CustNo, File.FileDDNo, MaxLength) - displays file notes, up to "MaxLength" characters.

Note that "MaxLength" should be replaced with the number of characters that the field is allows to expand to. A typical values is 3000. Larger values may be used if necessary (e.g.. 65,000)

Bar codes:

GetBoxBarcode(CustNo, BoxDDNo) - Standard box bar code
GetBoxBarcode36(CustNo, BoxDDNo) - Compact bar code, used for tapes
GetFileBarcode(CustNo, FileDDNo) - File bar code
GetLocationBarcode(Location) - Location bar code
GetActiveLocationBarcode(Location, LocationType)
GetEmployeeBarcode(EmployeeNo) - Employee bar code
GetUserBarcode(CustNo, UserNo) - Authorized user bar code, for customer account.

For box history activities:

if(box_history.Activity=1, 'IN', if(box_history.Activity=2, 'OUT', if(box_history.Activity=3, 'SELECTED', if(box_history.Activity=5, 'PRE ADD', if(box_history.Activity=8, 'ON DISPOSAL', if(box_history.Activity=9, 'ON TRANSFER', if(box_history.Activity=10, 'ON DELETION', if(box_history.Activity=11, 'DELETED', if(box_history.Activity=12, 'DESTROYED', if(box_history.Activity=13, 'TRANSFERRED', if(box_history.Activity=14, 'IN (IN-HOUSE)', if(box_history.Activity=15, 'OUT (IN-HOUSE)', if(box_history.Activity=36, 'REVISED', if(box_history.Activity=35, 'SAMPLED', if(box_history.Activity=37, 'SENT TO DEPOT', if(box_history.Activity=27, 'DESTROYED (IN-HOUSE)', if(box_history.Activity=32, 'PRINTED',if(box_history.Activity=39, 'ADDED',if(box_history.Activity=6, 'MOVED', 'end'))))))))))))))))))))))))))

For invoice header groups:

if(invoice_item.itemgroup=1, 'STORAGE', if(invoice_item.itemgroup=2, 'LABOR', if(invoice_item.itemgroup=3, 'COURIER', if(invoice_item.itemgroup=4, 'INVENTORY LIST', if(invoice_item.itemgroup=5, 'IMAGING', if(invoice_item.itemgroup=6, 'OPEN SHELF', if(invoice_item.itemgroup=7, 'SHREDDING/RECYCLING', if(invoice_item.itemgroup=8, 'SUPPLIES', if(invoice_item.itemgroup=100, 'MISCELLANEOUS', 'Unexpected group number - contact DocuData')))))))))

For price code units:

If(price.unittype=0,'Units',If(price.unittype=1,'Minutes',If(price.unittype=2,'Cubic Feet',If(price.unittype=3,'Megabytes',If(price.unittype=4,'Linear Feet',If(price.unittype=5,'Deliveries',If(price.unittype=6,'Pounds','Unknown')))))))

For destruction list destruction types:

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if(list.desttype<1,'Non-Confidential',if(list.desttype=2,'Confidential','Other'))

Group (see also Adding a group 508)
This tab is used to add groups to a report.

Adding a group to a report: Select a field in the list at the top (it will automatically be added to the bottom list). The report will be grouped according to the fields selected.

EX: If you want a report to be grouped by customer, by department and then by owner, you would select CustNo, MainDeptNo and BoxOwner (in this exact order) in the top window. If one changes the order of the selected fields (BoxOwner, MainDeptNo, CustNo) it would mean that the boxes on the report would be sorted first by owner, then by department and finally by customer.

Note: Groups allow the report document to be organized into sets of rows that share a common value. However, groups can only function if the field to which they are assigned has been used to sort the data. If you associate a group with a field, but do not sort the data by that field, then the group will still function. That is, the group will generate a group footer and group header each time the field value changes, but because the data is not sorted properly, the group will appear to generate at random. Whenever you see a group generating too many times, check to make sure the data is sorted properly.

Search
This tab is used to add search criteria to a report.

Adding a search criterion to a report: Select a field in the list at the top (it will automatically be added to the bottom list). Select an operator (=, <>, <, <=, >, >=, like, not like, between, not between, in list, not in list, blank, not blank) and enter a value.

AutoSearch : Check off the AutoSearch check box if you want the search criteria to appear in the preview tab of the report.

Mandatory : Check off the Mandatory check box if you want the search criteria to be a mandatory step before the generation (or the preview) of the report takes place.

Sort
This tab is used to determine the sorting order of a report.

Adding a sorting criterion to a report: Select a field in the list at the top (it will automatically be added to the bottom list). The report will be grouped according to the fields selected.

EX: If you want a report to be sorted by customer, by department and then by owner, you would select CustNo, MainDeptNo and BoxOwner (in this exact order) in the top window. If one changes the order of the selected fields (BoxOwner, MainDeptNo, CustNo) it would mean that the boxes on the report would be sorted first by owner, then by department and finally by customer.

Note: When using groups in your report, make sure that the sorting order and the order of the groups is the same. If it is not, then the report will not sort the data properly.

Desc (z > a) : Check off the Desc (z > a) check box if you want the data to be sorted in a manner contrary to the alphabetical order.

SQL
This tab allows one to see, copy and edit (if necessary) the SQL statement that is at the basis of the

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report. If the SQL statement is modified, the other tabs will be disabled and the SQL statement will prevail.

9.5.7 Location

9.5.7.1 Overview (Location)

While boxes and tapes are at the record center, they occupy locations.

Transit locations may contain any number of files or boxes of any size. These are defined in the Building module, since they are used in special ways. The remainder of box locations are defined in the Location module.

Available reports

- list of locations that are full or not, for a specific section at the record center
- report of volume usage

Fields (see the next section)

Tasks

- Adding or editing a location
- Deleting a location
- Auto-creating or deleting many locations
- Change location volume
- Printing laser labels for specific locations
- Printing thermal labels for specific locations
- Exporting location labels to a text file
- Viewing or printing the list of locations
- Viewing or printing the report of volume usage
- Finding a location using a bar code (includes alternate labels)

Distinctive menu options:

File menu

- Auto create locations
- Auto destroy locations
- Change location volume
- Print labels (Laser | Thermal | To file)

Find menu

- Find with Barcode (F8)

Module window:

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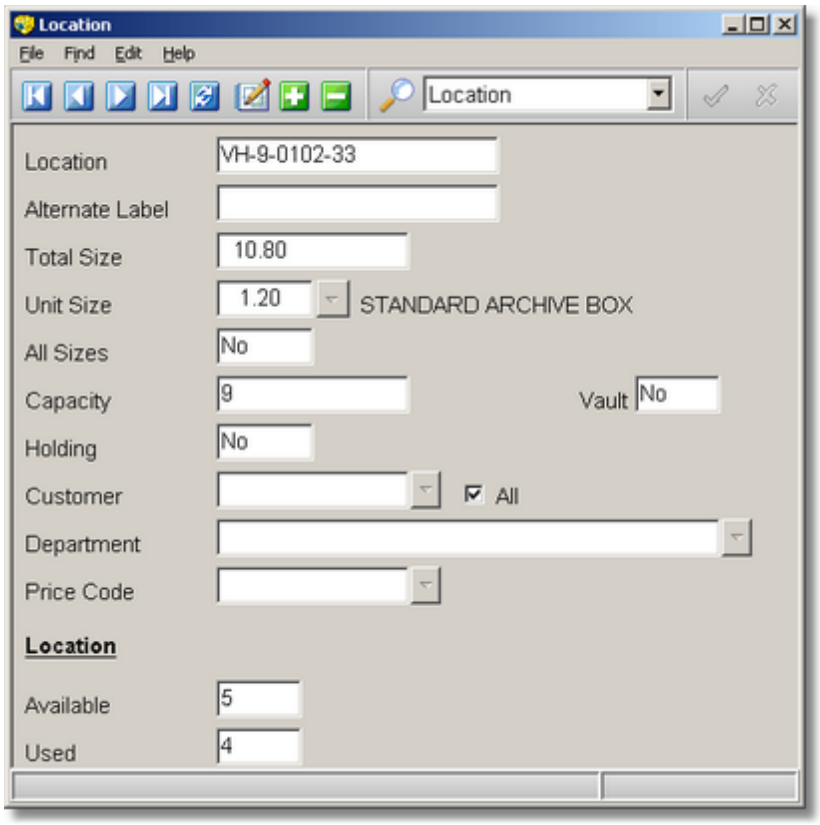

9.5.7.2 Fields (Location)

Location
Field with a mask predefined in the System Information[371] module.
This field allows to enter a code for the location, according to the predefined mask. Each location must be clearly identified and the location mask should be carefully thought out so that it accurately reflects the physical storage organization at the record center.

Alternate Label
Alphanumeric field containing a maximum of 20 characters.
This field indicates the alternate label of the location (ex:if the location already had a label before the company transferred to EDC RC software)

Total Size
This field indicates the total quantity of cubic feet that the location can contain. This value is calculated with the multiplication of the value entered in the Unit Size field by the value of the Capacity field.

Unit Size
Drop-down field associated to a list defined in the Box Type module.
This field allows to associate a box type to the location. Normally, boxes of only the same type can be stored in the location. But boxes from a different type can be stored here if the Bypass volume check[365] in the System Information module is set to "Yes" or the All Sizes attribute below is set to Yes.

All Sizes
When this field is set to "Yes", it means that the location can contain all the box sizes available.

Capacity

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Numeric field that can contain values "0" to "29999" inclusive.
This field indicates how many boxes the location can contain. It is the quantity of boxes that have a volume equivalent to the value entered in the previous field.

Vault
Choice field that can contain values "Yes" or "No".
When this field is set to "Yes", it means that the location is located in the vault at the record center. These locations are reserved for very important documents that are supposed to be stored in places with a high security level and a controlled environment. For example, when entering a new box in the Box module, it is possible to check off a Vault option, so that the box will have to be placed in a vault location.

Holding
Choice field that can contain values "Yes" or "No".
When this field is set to "Yes", it means that the location is a holding location. A holding location is usually a temporary location where the boxes wait until they are put in their final locations.

Customer / All
Drop-down field associated to the list of the record center customers, defined in the Customer Information module.
A location can be reserved to the exclusive usage of any customer selected here.
When "All" is checked, all the record center customers can store their boxes in that location.

Department
Drop-down field associated to the list of the customer's departments, defined in the Department module.
A location can be reserved to the exclusive usage of any department selected here.

Price code
Drop-down field associated to the list of price codes. This field is enabled when the location is assigned to a customer. If a price code is applied here, that price code will be billed to the customer once per storage invoice. This is useful if the customer rents the storage space rather than paying per box.

Location
Available
This field indicates how many items can be added in that location. This field is automatically updated by the system when refiling or retrieving documents, or when manually adjusting the next field.

Used
This field indicates how many items are actually stored in the location. This field is automatically updated by the system when refiling or retrieving documents. But it is possible to manually adjust this field when necessary and to set properly the last two fields of this module.

If this value becomes inaccurate, running the Rebuild Space Usage[401] function will recalculate the number of boxes in each location.

9.5.7.3 Adding or editing a location

1 Click on **Inventory**->**Location** from the Main Window.
2 When editing a location, find it before and get it on the screen, then click on **Edit**->**Add**|**Edit**.
3 Enter or modify the desired information in the appropriate fields (see the previous section[514] for more details).

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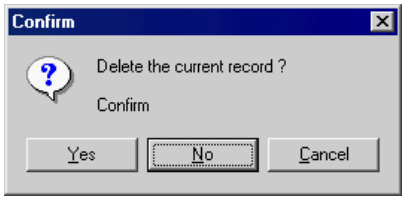
4 Click on the **Accept** button to save changes for the old location or to register the new location.

9.5.7.4 Deleting a location

Sometimes, it is necessary to delete one or more locations. For example, the record center can decide to renovate a part of the storage areas and to build offices instead of locations for documents. Because this old part of the record center is not operational anymore, the related locations must be erased from the system.

1 Click on **Inventory**->**Location** from the Main window.
2 Search the desired location and when it is on the screen, click on **Edit**->**Delete**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion. The location is automatically erased in the system.

Note : In order to be deleted, a location must not contain any document. If it does, an error message will appear during the current operation, so it will be necessary to retrieve all the related documents from the location (see the Internal Transfer List[571] module or the moving items with the PDT[766]).

9.5.7.5 Auto-creating or Auto-destroying many locations

These functions allow the creation or deletion of many locations in the same operation.

Note : Locations can only be auto-created for the building where the operation is initiated from. The building code displayed by default at the beginning of the location mask (Start and End fields) is the code of the building in question and cannot be changed.

Auto-create locations

1 Click on **Inventory**->**Location** from the Main window.
2 Click on **File**->**Auto Create Locations**. A window appears.

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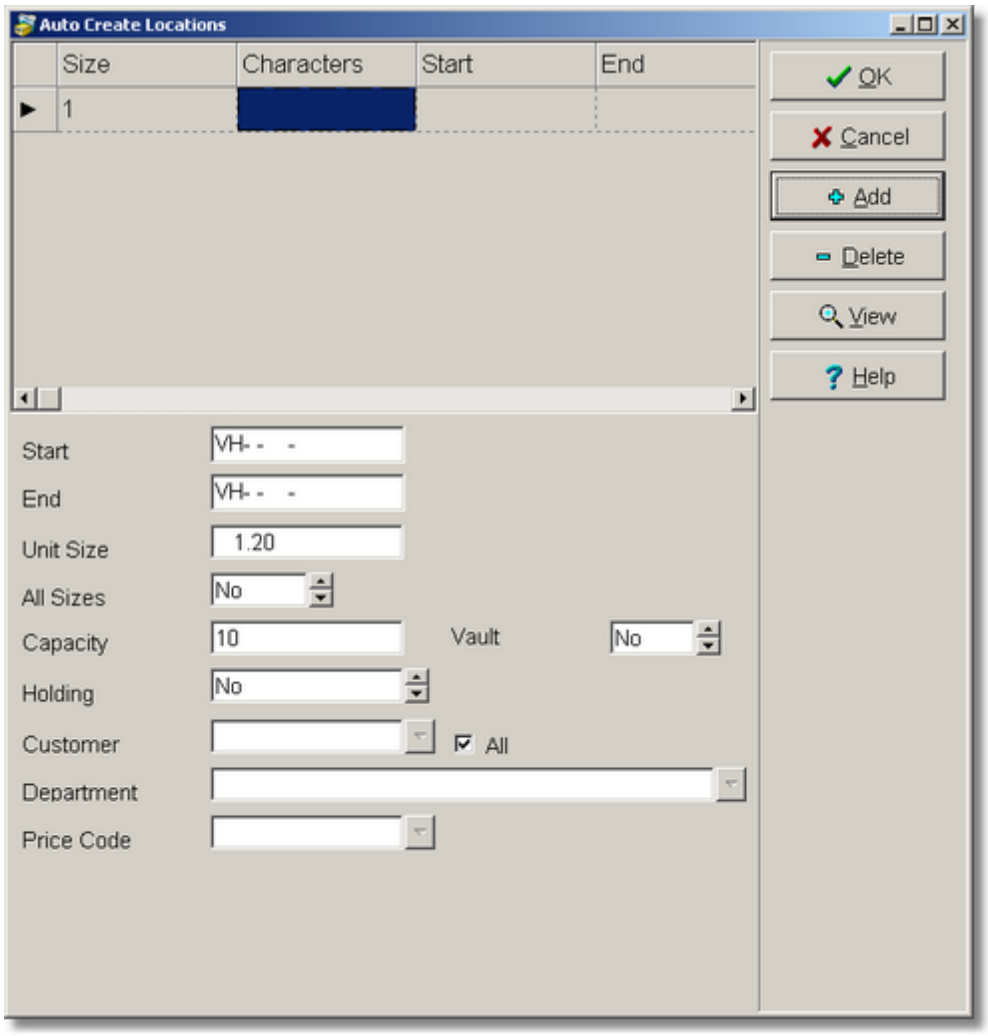

Note : When opening this window for the first time it is empty, but the one shown here is an example when parameters have already been entered for the creation (following operations).

3 Fill in the following fields :

***Start** - This field is used to enter the first location of the interval of locations to create. It should respect the mask for locations defined in the System Information[371] module.
***End** - This field is used to enter the last location of the interval of locations to create. It should respect the mask for locations defined in the System Information[371] module.

***Unit size** - This field is used to enter the quantity of cubic feet for each unit of a location. Most of the time, this unit corresponds to the common volume of boxes or tapes in the Box module.
***All sizes** - Check box that is used to specify if all the box sizes are accepted in these locations.

***Capacity** - Numerical field used to enter the quantity of units a location may contain (how many boxes, tapes or any documents whose volume is equivalent).

***Vault** - Check box that is used to specify if the items stored in these locations are in the Vault. If Yes is selected, only items that have the vault option checked will be allowed to be stored in these locations.
***Holding** - Check box that is used to specify if the locations are going to be used for holding purposes.

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-- The three following fields are only available when the 'All' check box is unchecked --
Customer - Drop-down list that is used to specify if the locations will be assigned to one of the record center's customers. If one customer is chosen in the list, only this customer's boxes can be put in that location.
Department - Drop-down list associated to the list of the customer's departments. When a department is selected here, the locations are reserved to the exclusive usage of this specific department.
Price code - Drop-down list associated to the list of price codes. Normally a storage price code should be associated to this field. When a price code is assigned to these locations, the boxes that are in that location will be charged using this specific price code.

Note: All the required fields are marked by a star (*).

6 Then click on the **Add** button to enter the parameters that will be used to create the new locations in the system. See the rules for auto-creation 518 for more information.

Note : Each time this operation is performed a line is added at the top of the window opened in **2**. It allows to enter the parameters needed to create each character strings present in a location number. It is essential to be careful when entering these parameters, in order to insure that all the locations included in the chosen interval will be created properly

8 Click on the **View** button to display a list of all the locations that will be added in the system. An error message is displayed when some parameters have not been entered correctly. It is then necessary to find the error and to correct it.
9 When every parameter is set properly, press **OK**. A dialog box appears and asks to confirm the operation.
10 Click on the **Yes** button of this dialog box and the system will automatically create the locations in question.

Rules for auto-creation

In the following example, the location mask is AA-9-9999-99 and the interval of locations to be created is VH-9-0201-01 to VH-9-0303-06. The building's code (VH) and the hyphens (-) are not considered, so 7 characters will be considered when creating the sequences (9020201 to 9030306).

Here are the chosen sequences :

- The first two characters must be unmodifiable (VH-**9**-**0**201-01 ... VH-**9**-**0**303-06).
- The third character must be incremented one character at a time (VH-9-0**2**01-01... VH-9-0**3**01-01).
- The characters 4 and 5 must be incremented together, one pair at a time, from 01 to 04 (VH-9-02**01**-01 ... VH-9-02**02**-01 ... VH-9-02XX-XX ... VH-9-02**04**-01 ... VH-9-03**01**-01).
- The last two characters must be incremented together, one pair at a time, from 01 to 06 (VH-9-0201-**01** ... VH-9-0201-**02** ... VH-9-0201-XX ... VH-9-0201-**06**).

Here are the parameters which have to be entered, in order to create properly the chosen sequences (each line corresponds to one of the 4 points described above) :

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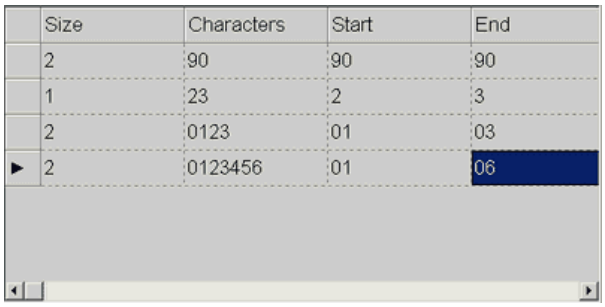


	Size	Characters	Start	End
	2	90	90	90
	1	23	2	3
	2	0123	01	03
►	2	0123456	01	06

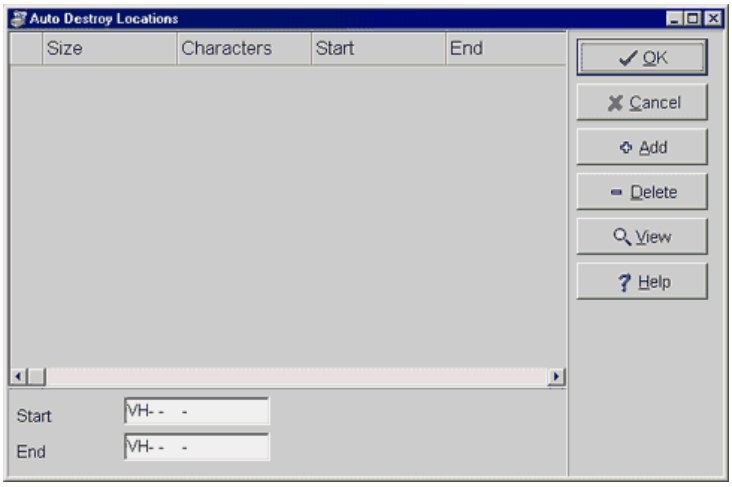
Size : allows to enter the size of the sequence, such as "1" when the character is alone or "2" when it is a pair, etc.
Characters : allows to enter the possible values for the characters of the sequence.
Start : allows to enter the minimum value for the sequence.
End : allows to enter the maximum value for the sequence.

Here are the locations created :

VH-9-0201-01	VH-9-0202-01	VH-9-0203-01
VH-9-0201-02	VH-9-0202-02	VH-9-0203-02
VH-9-0201-03	VH-9-0202-03	VH-9-0203-03
VH-9-0201-04	VH-9-0202-04	VH-9-0203-04
VH-9-0201-05	VH-9-0202-05	VH-9-0203-05
VH-9-0201-06	VH-9-0202-06	VH-9-0203-06
VH-9-0301-01	VH-9-0302-01	VH-9-0303-01
VH-9-0301-02	VH-9-0302-02	VH-9-0303-02
VH-9-0301-03	VH-9-0302-03	VH-9-0303-03
VH-9-0301-04	VH-9-0302-04	VH-9-0303-04
VH-9-0301-05	VH-9-0302-05	VH-9-0303-05
VH-9-0301-06	VH-9-0302-06	VH-9-0303-06

Auto-destroy locations

1 Click on **Inventory**->**Location** from the Main window.
2 Click on **File**->**Auto Destroy Locations**. A window appears.



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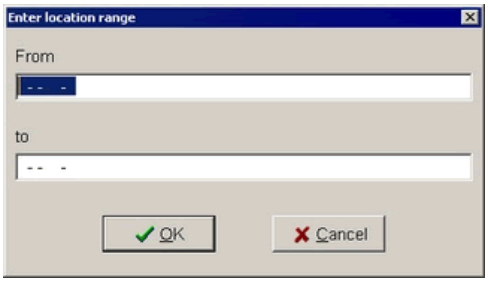
3 Enter the desired parameters as for a creation (see the two previous operations).
4 Click on the **View** button if so desired and press **OK**.
5 Click on the **Yes** button of the dialog box which is displayed in order to confirm the operation.
The locations in question will be automatically deleted from the system. Any location that contains documents cannot be deleted as long as these documents are not transferred to another location.

Note : The system keeps in memory the last creation parameters as long as the module is not closed. Then if some locations were just added by mistake, the window for auto-destruction will contain the parameters related to these locations. It will only be necessary to approve their destruction.

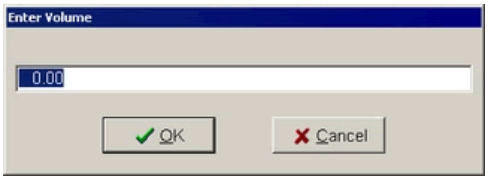
9.5.7.6 Change Location Volume

This allows the record center to change the volume of many locations at a time.
WARNING: This process is **irreversible** and can be tricky if the operation is done unknowingly.

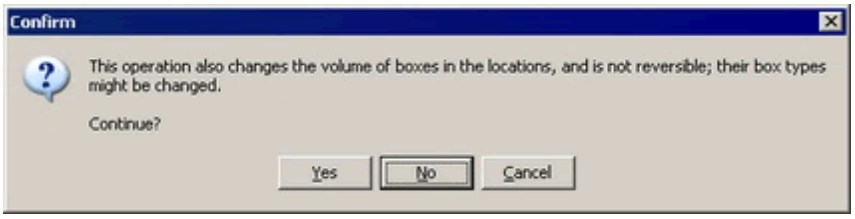
1 Click on **Inventory**->**Location** from the Main window.
2 Click on **File**->**Change Location Volume**. A window appears.



3 Enter a location range and press **OK**. A window appears.



4 Enter the new volume and press **OK**. A message appears.


Confirm
This operation also changes the volume of boxes in the locations, and is not reversible; their box types might be changed.
Continue?
Yes
No
Cancel

5 To continue click on **Yes**. To abort the operation press **No** or **Cancel**.

9.5.7.7 Printing laser labels for specific locations

When a new location is created it is necessary to print the bar code label that will be affixed in front of the location and that may be read when refiling documents. Furthermore, it can be necessary to reprint labels when they are damaged and when their bar codes cannot be read anymore.

1 Click on **Inventory**->**Location** from the Main window.

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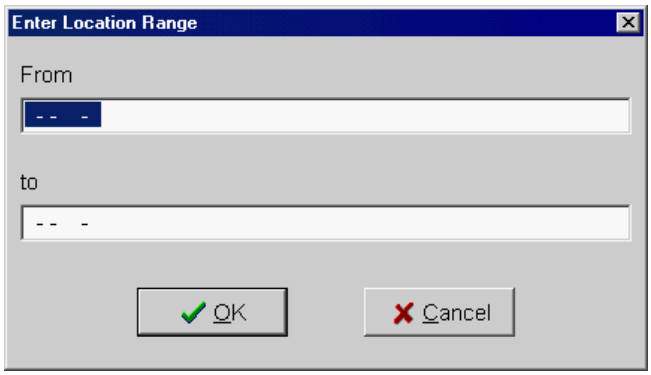
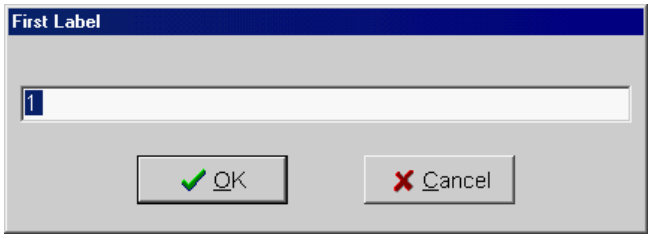
2 Click on **File**->**Print Labels**->**Laser**. A window appears.



3 Enter an interval of locations for which labels are printed and press **OK**. A new window opens.



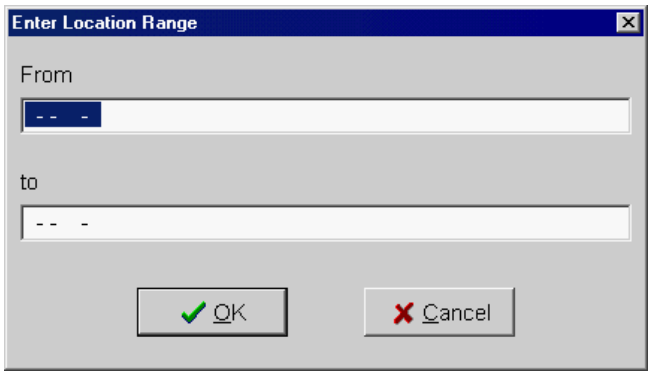
4 Enter a number to specify where to start on the page of Avery labels that is inserted in the printer and press **OK**.Labels are automatically printed from the default printer.

Shortcut: Shift + F7

***Example:**

9.5.7.8 Printing thermal labels for specific locations

1 Click on **Inventory**->**Location** from the Main window.
2 Click on **File**->**Print Labels**->**Thermal**. A window appears.



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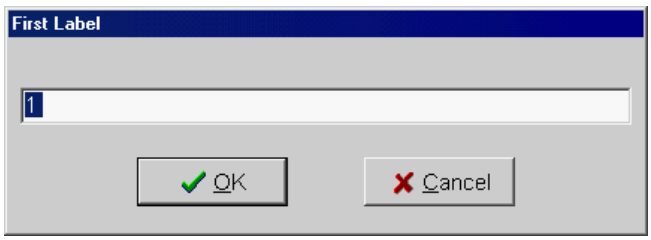
3 Enter an interval of locations and click on the **OK** button. A new window opens.

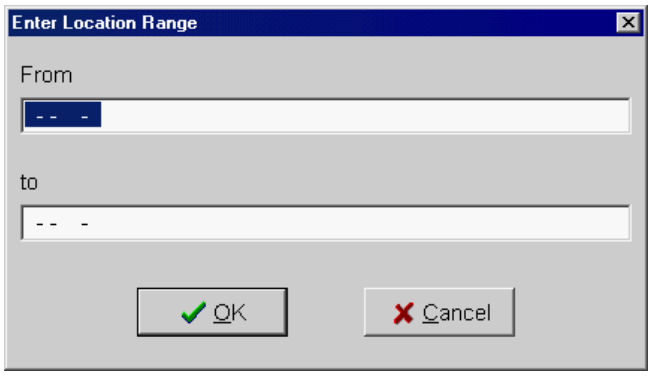


4 Enter a number to specify where to start on the page and click on the **OK** button. Labels are automatically printed from the thermal printer attached to the workstation.

9.5.7.9 Exporting location labels to a text file

A record center may decide to have a third party print its location labels. With this operation, the record center can simply send the location numbers to the third party by email with a text file attached.

1 Click on **Inventory**->**Location** from the Main window.
2 Click on **File**->**Print Labels**->**Export to file**. A window appears, different for each workstation, and asks to enter a file name and directory.
3 Enter a name and select a directory for the exportation then click on the **Save** button (or **Enter**, etc). A window appears.



4 Enter an interval of locations and press **OK**. The locations in question are automatically exported to the text file previously chosen.

9.5.7.10 Viewing or printing the list of locations

This operation allows to print the list of locations, full or not, that can contain documents of a certain volume and included in a specific range of location numbers.

1 Click on **Inventory**->**Location** from the Main window..
2 Click on **File**->**View Report**|**Print Report**->**Location**. A dialog box appears.

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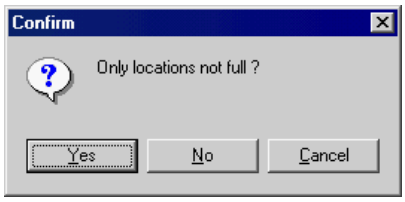
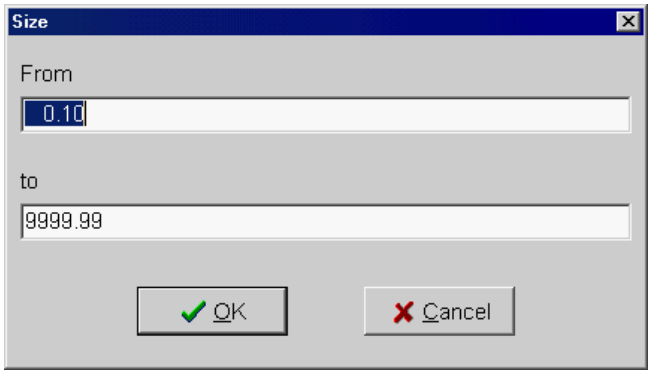


3 Click on the **Yes** or on the **No** button, respectively to produce a report including the not full or the full locations. A window appears and allows to enter a range of locations.
4 Enter the range of locations for which the report is produced and press **OK**. A new window opens.

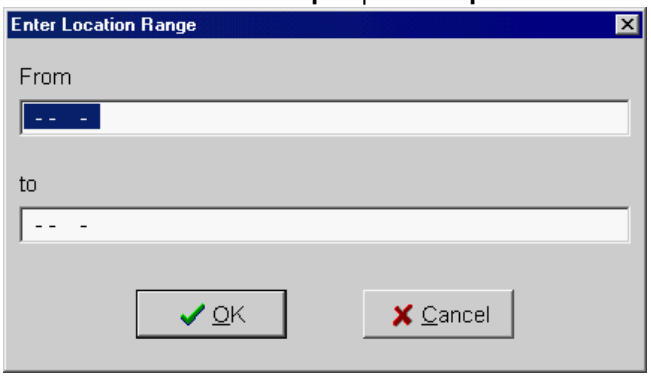


5 Specify an interval of sizes and press **OK**. These sizes correspond to the volume of the items that can contain the locations included on the report (see the Unit Size[514] field in the current module). The report is automatically printed or displayed. When viewing the report, click on the **Close** button of the report's window to finish.

9.5.7.11 Viewing or printing the report of volume usage

This operation prints a detailed report of space usage for a specific range of locations. The report includes the volume used for each location, the available spaces and the percentage of items in and out.

1. Click on **Inventory**->**Location** from the Main window.
2. Click on **File**->**View Report**|**Print Report**->**Volume Usage**. A window appears.



3. Enter an interval of locations for which the report is produced and press **OK**. The report is automatically printed or displayed. When viewing the report, click on the **Close** button of the report's window to finish.

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9.5.7.12 Finding a location using a bar code (includes alternate lables)

To navigate to the record of a location using an EDC bar code or alternate label:

1. Open the **Inventory->Location** module.
2. Press the **F8** key, or from the menu, select **Find->Find with bar code**.
3. **Scan** the bar code with a bar code scanner (not the PDT), or type the label and press **Enter**.

EDC will take you to the record for this location.

9.5.8 Shelf Location

9.5.8.1 Overview (Shelf Location)

This module allows the management of locations used to store files on open shelves (versus in boxes) at the off-site record center.

Available reports

- list of open shelf locations[531], for one or all customers, by location, empty shelves, media, occupation date, range, description or quantity

Fields[525] (see the next section)

Tasks

- Adding or editing an open shelf location[526]
- Deleting an open shelf location[528]
- Marking an open shelf location as full or empty[529]

Distinctive menu options:

File menu

- Auto create locations[526]
- Auto destroy locations[526]
- Print labels->Laser[529]
- Print labels->Thermal[530]
- Print labels->To file[531]

Edit menu

- Set EMPTY[529]
- Set OCCUPIED[529]

Module window:

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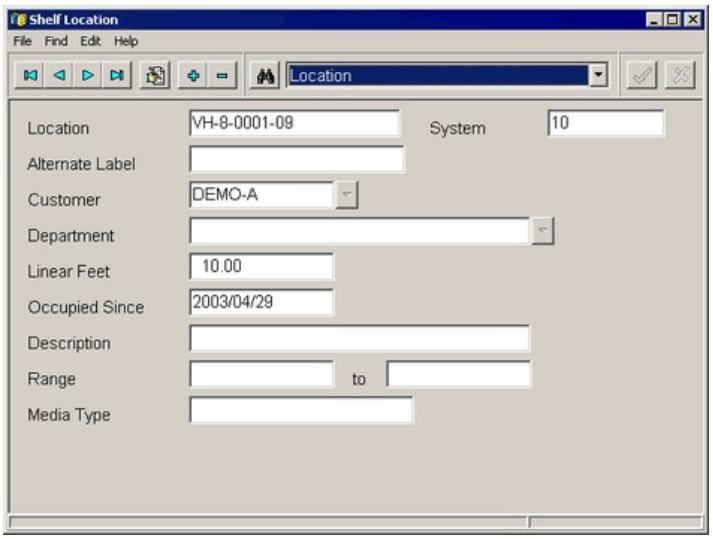

9.5.8.2 Fields (Shelf Location)

Location
Unique code for the location that must match the location mask defined in the system information[371] module. This code should be consistent with the location-labeling logic of the record center for efficient picking.

Alternate Label
Alphanumeric field containing a maximum of 20 characters.
This field is typically used for connecting a location with a label that was in place before the record center implemented EDC RC.

System
This unique identifier is assigned by the system and is unmodifiable

Customer / Department
Because open shelf files are not in boxes and storage is billed by linear foot, each shelf location must be assigned to a specific customer by entering a customer key or selecting the customer from the drop-down list. If the customer billing is by Department, then each location must also be assigned to a department.

Linear Feet
The length of the location may range from "0.00" to "9999.99". This is used in calculating storage charges.

Occupied Since
Unmodifiable date field that records the date on which the location first contained an item or was manually marked as occupied. (see "Marking an open shelf location as full or empty[529] "). This date is used in calculating storages costs for the customer to whom the location is assigned.

Description
Alphanumeric field that allows the user to enter a description for the location, for customer reference.

Range from/to
This field accepts the range of files contained in the location, and may be used by customers for

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reference purposes.

Media Type
Alphanumeric field for customer reference. For example, a hospital, may specify in which locations there are x-rays and in which there are regular medical sheets.

9.5.8.3 Adding or editing an open shelf location

1. Open the **Inventory->Shelf Location** module.
2. Navigate to the location to be edited and select **Edit->Edit**, or select **Edit->Add** to add a new one.
3. Enter or modify the desired information in the appropriate fields (see the previous section 525 for more details).
4. Click on the **Accept** button to save changes or to register the new shelf location.

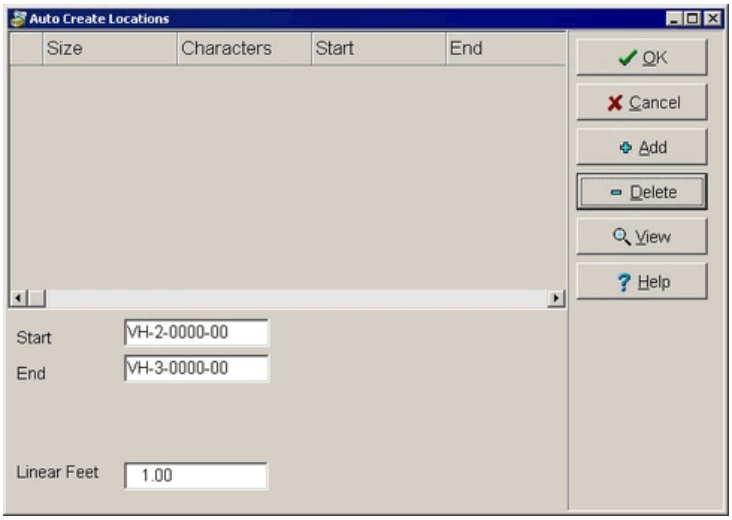
9.5.8.4 Auto-creating or Auto-destroying shelf locations

Auto-creating shelf locations

This function allows the creation of many shelf locations in the same operation.

Note : Locations can only be auto-created for the building where the operation is initiated from. The building code displayed by default at the beginning of the location mask (Start and End fields) is the code of the building in question and cannot be changed.

1 Click on **Inventory**->**Shelf Location** from the Main window.
2 Click on **File->Auto Create Locations.** A window appears.



3 Move to the Start and End fields at the bottom of the window then enter the interval of locations to create. These fields respect the mask for locations defined in the System Information 371 module.
4 Move to the Linear Feet field and enter the quantity of feet for each unit of a location. Most of the time, this unit corresponds to the length of your shelves.
5 To add a location press on the **Add** button.

Note : Each time this operation is performed a line is added at the top of the window opened in **2**. It allows to enter the parameters needed to create each character strings present in a location number. It is essential to be careful when entering these parameters, in order to insure that all the locations included in the chosen interval will be created properly.

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6 Click on the **View** button to display a list of all the locations that will be added in the system. An error message is displayed when some parameters have not been entered correctly. It is then necessary to find the error and to correct it.
7 When every parameter is set properly, click on the **OK** button. A dialog box appears and asks to confirm the operation.
8 Click on the **Yes** button of this dialog box and the system will automatically create the locations in question.

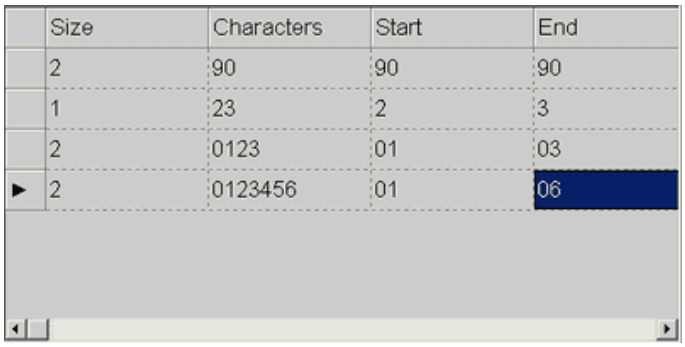
Rules for auto-creation

In the following example, the interval of locations to be created is VH-9-0201-01 to VH-9-0303-06. The building's code (VH) and the hyphens (-) are not considered, so 7 characters will be considered when creating the sequences (9020201 to 9030306).

Here are the chosen sequences :

- The first two characters must be unmodifiable (VH-**9**-**0**201-01 ... VH-**9**-**0**303-06).
- The third character must be incremented one character at a time (VH-9-0**2**01-01... VH-9-0**3**01-01 ... VH-0**4**01-01).
- The characters 4 and 5 must be incremented together, one pair at a time, from 01 to 04 (VH-9-02**01**-01 ... VH-9-02**02**-01 ... VH-9-02XX-XX ... VH-9-02**04**-01 ... VH-9-03**01**-01).
- The last two characters must be incremented together, one pair at a time, from 01 to 06 (VH-9-0201-**01** ... VH-9-0201-**02** ... VH-9-0201-XX ... VH-9-0201-**06**).

Here are the parameters which have to be entered, in order to create properly the chosen sequences (each line corresponds to one of the 4 points described above) :



	Size	Characters	Start	End
	2	90	90	90
	1	23	2	3
	2	0123	01	03
▶	2	0123456	01	06

Size : allows to enter the size of the sequence, such as "1" when the character is alone or "2" when it is a pair, etc.
Characters : allows to enter the possible values for the characters of the sequence.
Start : allows to enter the minimum value for the sequence.
End : allows to enter the maximum value for the sequence.

Here are the locations created :

VH-9-0201-01	VH-9-0202-01	VH-9-0203-01
VH-9-0201-02	VH-9-0202-02	VH-9-0203-02
VH-9-0201-03	VH-9-0202-03	VH-9-0203-03
VH-9-0201-04	VH-9-0202-04	VH-9-0203-04
VH-9-0201-05	VH-9-0202-05	VH-9-0203-05

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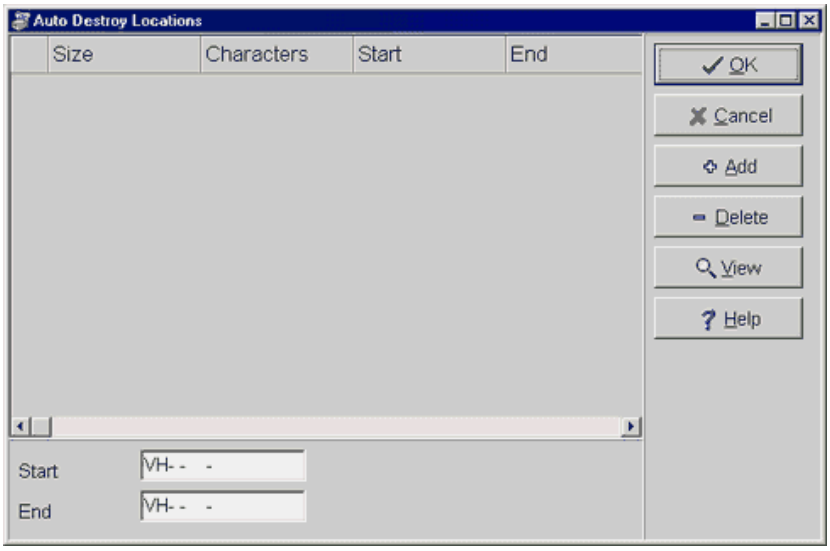
VH-9-0201-06	VH-9-0202-06	VH-9-0203-06
VH-9-0301-01	VH-9-0302-01	VH-9-0303-01
VH-9-0301-02	VH-9-0302-02	VH-9-0303-02
VH-9-0301-03	VH-9-0302-03	VH-9-0303-03
VH-9-0301-04	VH-9-0302-04	VH-9-0303-04
VH-9-0301-05	VH-9-0302-05	VH-9-0303-05
VH-9-0301-06	VH-9-0302-06	VH-9-0303-06

Auto-destroy shelf locations

1 Click on **Inventory**-> **Shelf Location** from the Main window.
2 Click on **File**->**Auto Destroy Locations**. A window appears.



3 Enter the desired parameters as for a creation (see the previous operations).
4 Click on the **View** button if so desired and click on the **OK** button.
5 Click on the **Yes** button of the dialog box which is displayed in order to confirm the operation.
The locations in question will be automatically deleted from the system. Any location that contains documents cannot be deleted as long as these documents are not transferred to another location.

Note : The system keeps in memory the last creation parameters as long as the module is not closed. Then if some locations were just added by mistake, the window for auto-destruction will contain the parameters related to these locations. It will only be necessary to approve their destruction.

9.5.8.5 Deleting an open shelf location

As it is sometimes necessary to delete regular locations, it can be necessary to do the same for shelf locations. Here is the operation that allows to perform that deletion.

1 Click on **Inventory**->**Shelf Location** from the Main window.
2 Search the desired shelf location and when it is on the screen, click on **Edit**->**Delete**. A dialog box appears.

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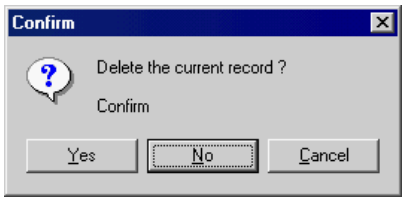

3 Click on the **Yes** button to confirm the deletion. The shelf location is automatically erased in the system and will not appear anywhere, especially in the list of shelf locations available for refiling in the Delivery Return module.

Note : In order to be deleted, a shelf location must be empty. If there are any documents left in the location, an error message will appear during the current operation, so it will be necessary to retrieve all the documents from the location (see the Internal Transfer List[571] module).

9.5.8.6 Marking an open shelf location as full or empty

The first time an inventoried file is placed on a shelf, the bar code of the file and the shelf location are scanned with the bar code reader. The current date is automatically put in the Occupied Since field of the present module and the billing for this shelf location is starting. But there is a problem when storing non track files, that represent the major part of documents stored on open shelf locations.

Since this record series does not have a bar code label, when storing a non track file for the first time on a shelf it is not possible to register the operation and to start the billing for the current shelf location. That is why the present operation was created, in order to allow the record center to manually indicate when a shelf location is used for the first time in that particular situation.

In the same way, the record center can manually indicate the final retrieval of all the non track files stored on a same shelf location, so that the storage fees must not be charged anymore.

1 Click on **Inventory**->**Shelf Location** from the Main window.
2 Search the shelf location to which the non track files are inserted or final removed.
3 Click on **Edit**->**Set EMPTY|Set OCCUPIED**. Accordingly to the operation that is performed, the system automatically puts the current date in the Occupied Since field or delete any date that was present in it.

Note : When there are documents left on the shelf location, it cannot be marked as being empty. It is necessary to transfer all these documents by creating an internal transfer list.

9.5.8.7 Printing laser labels for specific locations

1 Click on **Inventory**->**Shelf Location** from the Main window.
2 Click on **File**->**Print Labels**->**Laser**. A window appears.

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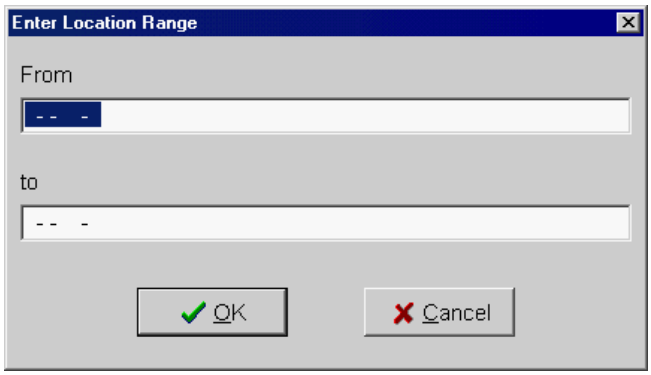
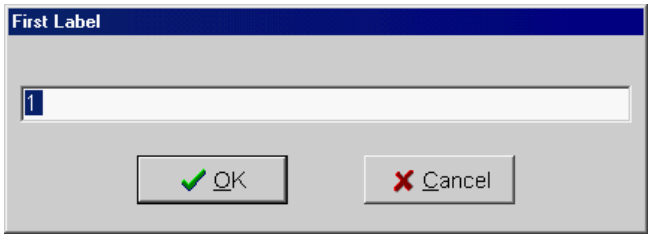


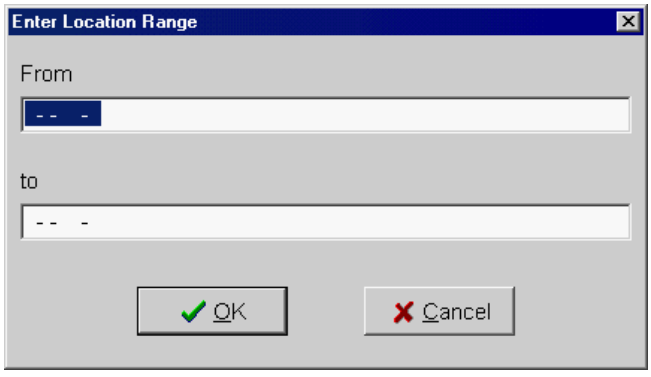
3 Enter an interval of shelf locations for which labels are printed and click on the **OK** button. A new window opens.



4 Enter a number to specify where to start on the page that is inserted in the printer and click on the **OK** button. Labels are automatically printed on the default printer.

9.5.8.8 Printing thermal labels for specific locations

1 Click on **Inventory**->**Shelf Location** from the Main window.
2 Click on **File**->**Print Laser**->**Thermal**. A window appears.



3 Enter an interval of shelf locations and press **OK**. A new window opens.

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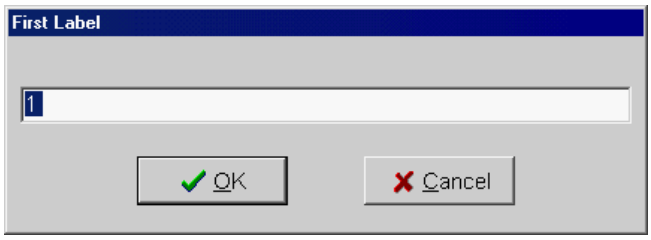
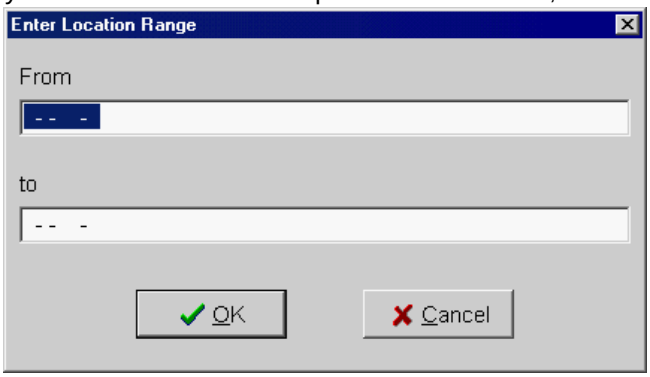


4 Enter a number to specify where to start on the page and press **OK**. Labels are automatically printed from the thermal printer attached to the workstation.

9.5.8.9 Exporting location labels to a text file

It is possible to export location labels to a text file, should you wish to have these labels printed outside EDC.

1. Open the **Inventory->Shelf Location** module.
2. From the menu select **File->Print Labels->Export to file**. A window prompts for a file name and directory to save to.
3. Once you have entered and accepted this information, a window appears.



4. Enter an interval of shelf locations and press **OK**. The locations in question are exported to the specified text file

9.5.8.10 Viewing or printing the list of open shelf locations

1. Open the **Inventory->Shelf Location** module.
2. Click on **File->View Report|Print Report** and select one of the available sub-menus. The system will prompt for any required information then produce the report.

9.5.9 Activity Report

9.5.9.1 Overview (Activity Report)

This module creates reports based on the history of boxes and files

Available reports

- Box activities 533
- File activities 533
- Overdue memos 536

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- Active box report[535]
- Inactive box report[535]

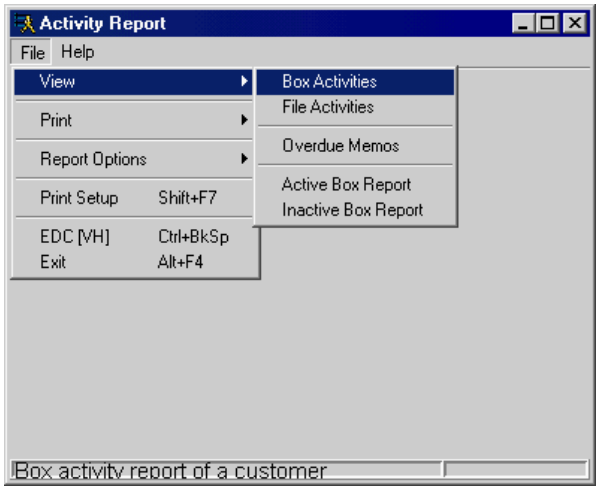
Fields (None)

Tasks

- Choosing the predefined report and editing its fields[532]
- Viewing or printing an activity report for boxes or files[533]
- Viewing or printing the report of active or inactive boxes[535]
- Viewing or printing overdue memos[536]
- Creating a report of overdue memos for a specific customer[536].

Distinctive menu options: (None)

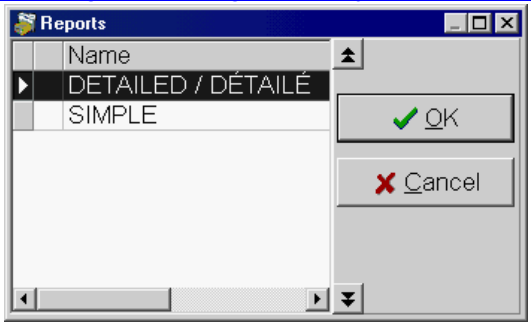
Module window:



9.5.9.2 Choosing the predefined report and editing its fields

To select one of these layouts for an activity report:

1. Open the **Inventory->Activity Report** module
2. Select **File->Report Options->Box|File->Select Predefined Box|File Report**. A list of reports defined through the Management->System Information module[386] appears.



3. Select the desired report and press **OK**.

To edit the report fields for this session:

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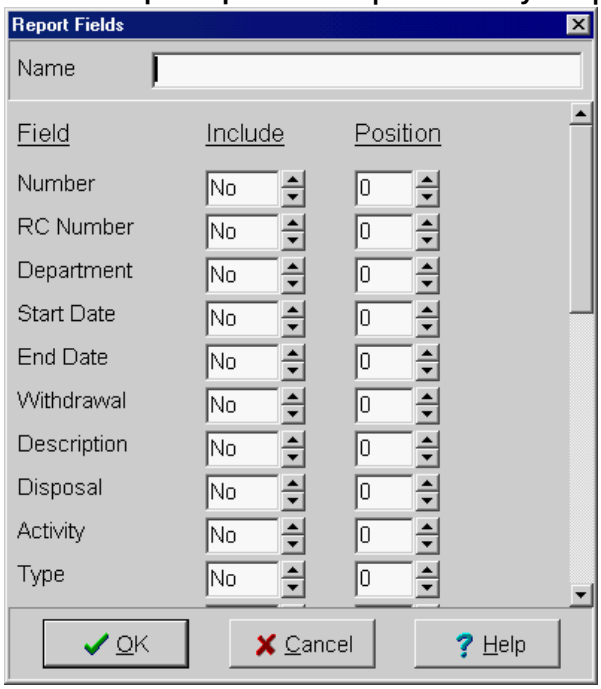
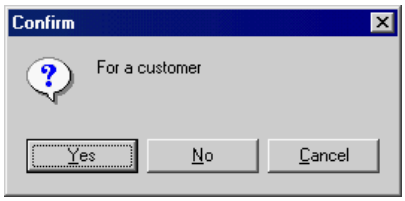
4. Click on **File->Report Options->Box|File->Modify Box|File Report Fields**. A window appears.



5. Set the value in the **Include** column for a field to Yes to include it, or to No to exclude it.
6. Adjust the value in the **Position** column to change the order of columns in the report.
7. Press **OK** to save changes.

9.5.9.3 Viewing or printing an activity report for boxes or files

1. Open the **Inventory->Activity Report** module.
2. To customize the report fields, select or modify a predefined report[532].
3. Click on **File->View|Print->Box|File Activities**. A dialog box appears.



4. Click on the **Yes** button to specify a customer, or **No** to include all customers. When producing a report for an individual customer, you may also specify a department. Once these questions are answered, a window appears.

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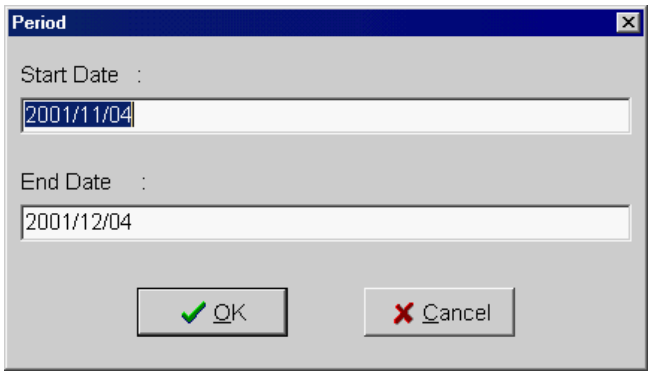
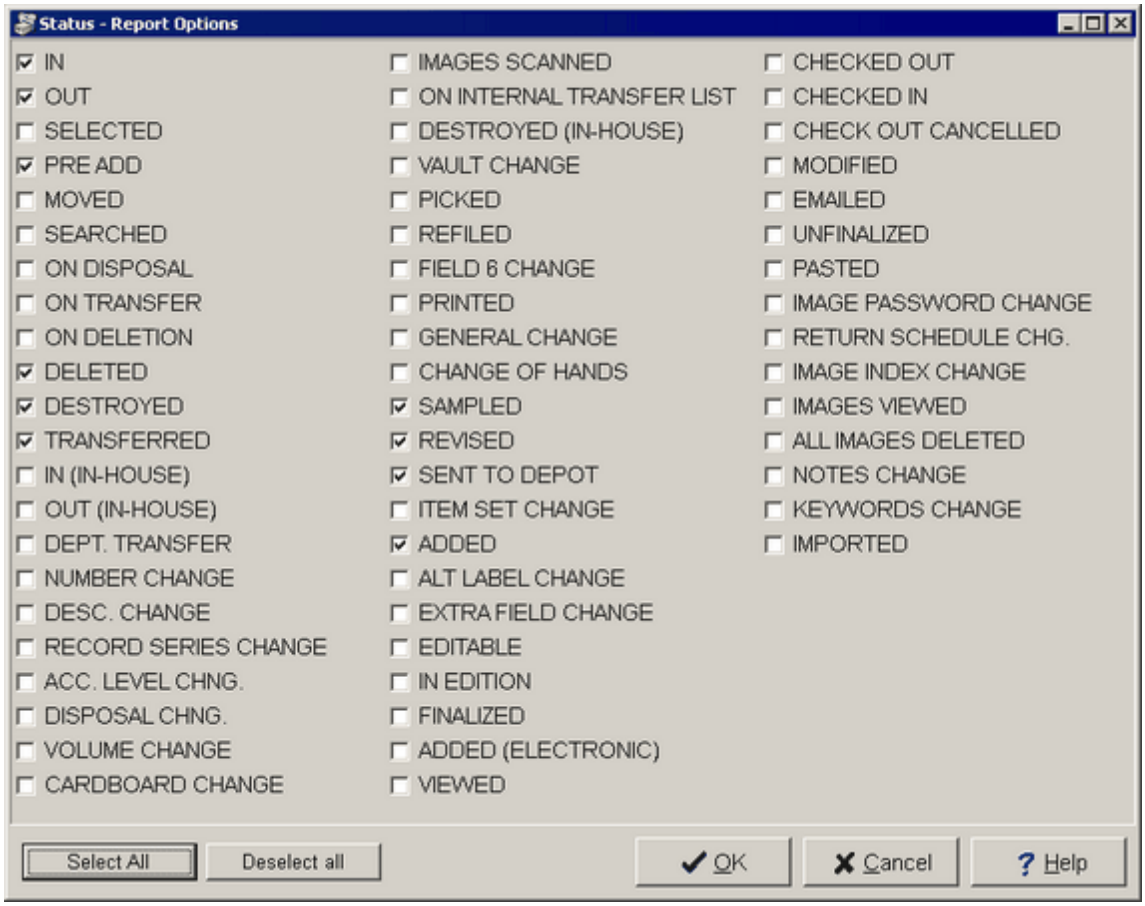


5. Specify the **Start date** and the **end date** for the report and press **OK**. A new window opens on the screen.



Note : The Chng. abbreviation means that the given parameter has changed. (ex: Disposal Chng means that the disposal of the document has been changed). A report can be produced for all activities included in the history of a document. Most of the options displayed in this window relate to different states[70] a document can take in its during its history with the record center.

6. Select the activities to capture in the report, then press **OK**.
7. The report is printed or displayed, depending on which menu option was initially selected. When

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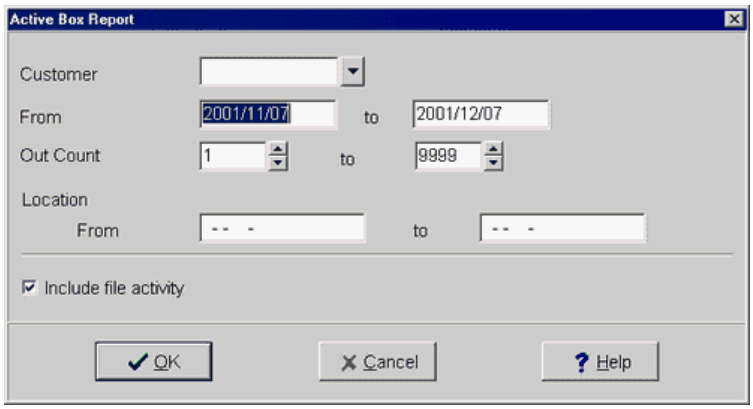
viewing a report, click on the **Close** button of the report's window to go back into the module.

Note : The default report will be used if step 2 is skipped. Furthermore, the first three fields of the reports are fixed and cannot be modified.

9.5.9.4 Viewing or printing the report of active or inactive boxes

Producing a report of active boxes

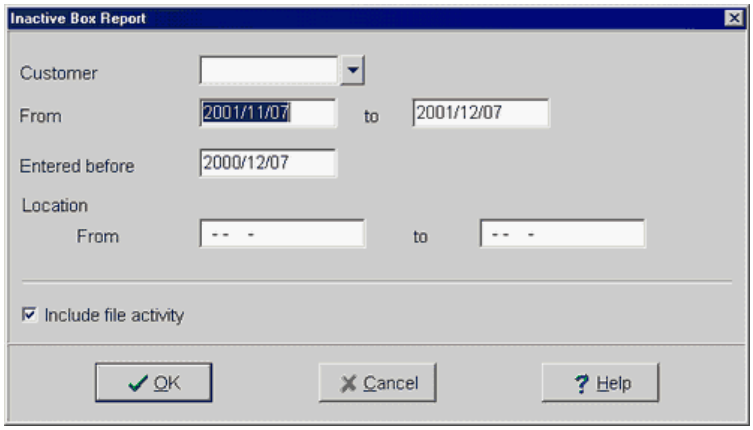
1. Open the **Inventory->Activity Report** module.
2. Select **File->View|Print->Active Box Report**. A window appears.



3. In the **Customer** field, specify a customer key, or leave it blank to include all customers
4. In the **From/to** fields, specify the range of dates to consider activity over.
5. In the **Out Count/to** fields, specify how many times the box must have gone out to be considered active.
6. In the **Location From/to** fields, you may specify a range of record center locations to consider
7. Check the **Include file activity** box if you wish to include the activity of files within the boxes. This will also cause file retrieval to be included as an activity for the box that it was in.
8. Click **OK**. The report will be produced.

Producing a report of inactive boxes

1. Open the **Inventory->Activity Report** module.
2. Select **File->View|Print->Inactive Box Report**. A window appears.



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3. In the **Customer** field, specify a customer key, or leave it blank to include all customers
4. In the **From/to** fields, specify the range of dates over which to consider activity.
5. In the **Location From/to** fields, you may specify a range of record center locations to consider
6. Check the **Include file activity** box if you wish to include the activity of files within the boxes. This will also cause file retrieval to be included as an activity for the box that it was in.
7. Click **OK**. The report will be produced.

9.5.9.5 Viewing or printing overdue memos

Records that are OUT from the record center to a customer are still considered part of the record center inventory. Storage is typically charged for reserving space for them, as it is expected that these items will return.

Overdue memos are used to notify customers which items have not returned in a while, so that the customer can decide whether to mark them as permanently out to cancel storage charges, or return them if appropriate.

1. Click on Open the **Inventory->Activity Report** module.
2. Click on **File->View | Print->Overdue Memos**. A window appears.
3. Enter the customer key or select it from the list, and press **OK**. A window appears.
4. Specify a date interval for when the unreturned items last went out, and click on the **OK** button. The overdue memos will produced.

9.5.9.6 Creating a report of overdue memos for a specific customer

Overdue memos are based on a template that can be modified for all customers or individual customers as follows:

1. Using your operating system's browser, navigate to EDC RC's data directory. (e.g. d:\docudata \EDCRC\Data)
2. Located the file called "DEFAULT.F01", and open it with a text editor such as notepad. (You might want to create a back-up copy of this file first.)
3. Before modifying the document, click on **File -> Save As**.
4. Save the document in the same directory. replacing "default" with the customer key to make it customer-specific.(ex: if one wants to create an overdue memo report for customer with the key DEM01, one will save the document as "DEM01.F01")
5. Modify the text in the memo, but in all cases do not modify "$user$" or "$date$", since these are used by the software to recognize and organize the data.
6. When all the changes have been performed, click on **File -> Save** and close the document.
7. View or print overdue memos [536] (choose the same customer for which you have created a customized report so the software will recognize the customer key in the name of the report and will import it).

IMPORTANT: One must never delete or write over the default templates ("DEFAULT.F01") since they are unique and cannot be copied from anywhere else if deleted.

Note: One can create one such customized report per customer key.

9.5.10 Disposal List

9.5.10.1 Overview (Disposal List)

The process of disposing of boxes and files for customers at the end of their retention period is tightly regulated. Multiple authorization and verification steps protect against inadvertent destruction of incorrect items. (See the procedures for destroying items [189].)

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Available reports

- For customer (authorization list of documents to be disposed of[549])
- Pallet (picking list of items to be disposed on a pallet[549])
- Pallets for list (pallets related to the current list[550])
- View | Print volume (volume of boxes to be disposed of[550])

Fields[538] (see the next section)

Tasks

- Using the PDT when destroying by pallet[547]
- Editing or deleting a CREATED transfer list[551]

Distinctive menu options:

File menu

- Create list[539] (Manually creating a disposal list[539])
- Auto create[542] (Auto-creating a disposal list[542])
- Multi-client auto create[543]
- Authorize[544]
- Create by-pallet lists[545]
- Processing
  - Send pallet picking list to PDT[546]
  - Receive pallet picking list from PDT[546]
  - Receive pallet verification list from PDT[546]
- Reset pallet[546]
  - Reprint Pallet label[547]
  - Delete images/documents related to pallet[549]
- Delete list[551]
- Find destruction list[550]

View

- Items[547]
- Notes[548]
- Authorized users[548] (Viewing authorized users who can approve disposal lists[548])

Edit menu

- Add boxes | from list | from text file[539]
- Notes[548]
- Remove items[551]
- Remove items, change date[551]
- Remove authorized items[552]
- Disposal type change[539]

Module window:

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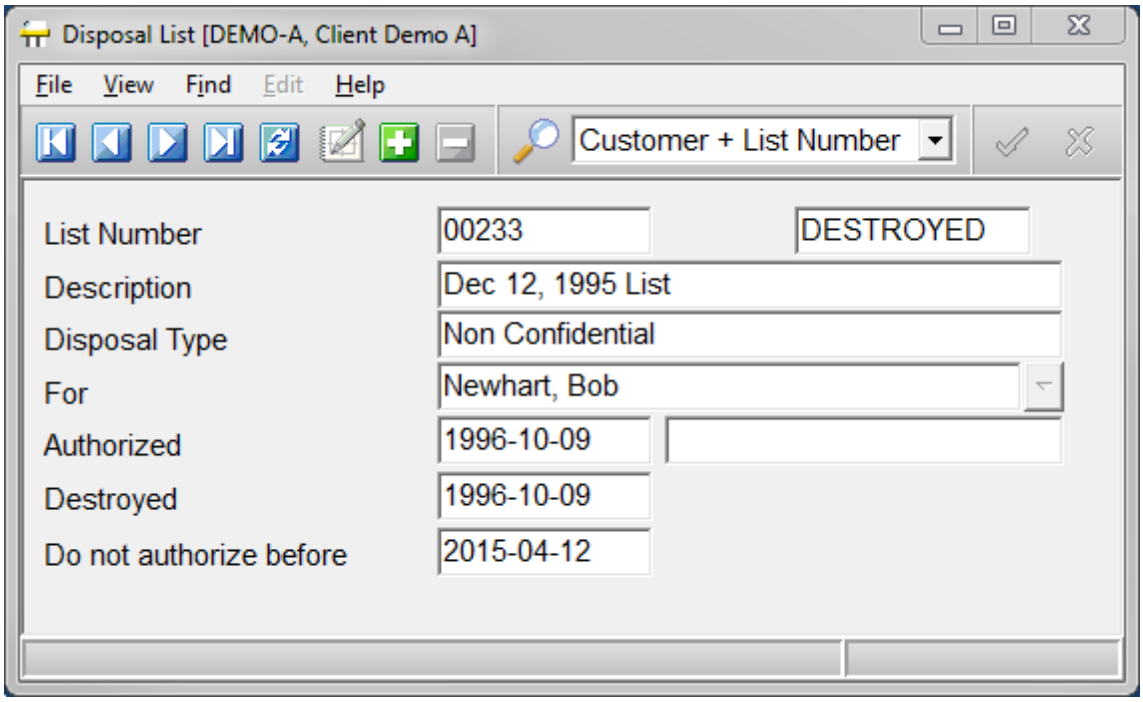

9.5.10.2 Fields (Disposal List)

List Number
Number generated by the system to identify the list. A number with a decimal indicates that a list has been reset so changes could be done.

Status
Indicates where the list is in the treatment process :

CREATED : the list is being created (it can be edited or deleted);
LOCKED : the list has been printed and sent to the customer for authorization. It still can be reset for deletion or changes;
AUTHORIZED : the list has been returned properly signed and authorized to the record center. It cannot be edited or deleted anymore;
DESTROYED: the list has been processed and the concerned documents have been disposed according to the chosen mode.

Description
Description of the current list.

Disposal Type
This field can take values "Confidential", "Non confidential", "Send to depot", "Sample" or " Revision". It indicates the disposal mode that will be used to dispose of the documents (see the glossary[866] for more details on disposal modes).

For
Indicates the authorized user for whom the list has been created.

Authorized
Indicates the date when the list has been authorized.

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Destroyed
Indicates the date when the list has been destroyed.

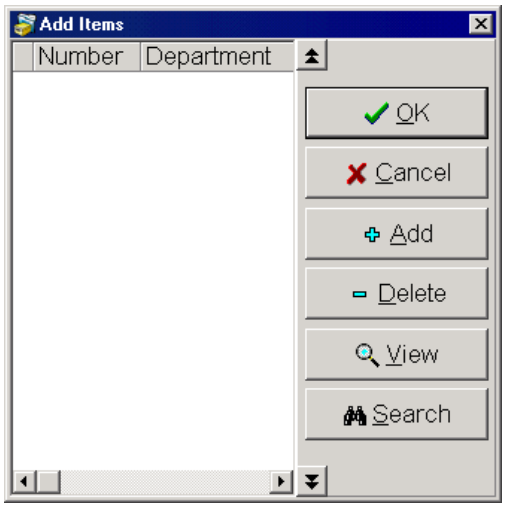
Do not authorize before

This field provides an added check to protect against authorizing a disposal list for processing prematurely. This is especially useful if you have an account with inactive boxes where in the absence of news, you have authorization to destroy the items on a given date but not earlier.
***

9.5.10.3 Manually creating a disposal list

1 Click on **Inventory**->**Disposal List** from the Main window.
2 Click on **File**->**Create List**. A window appears and asks to enter a customer code.
3 Enter the code of the customer in question and press **OK**. A new window appears and displays the list of its users.
4 Select a user and press **OK**. The system generates a new list whose number follows the number of the last list created for this customer. The user selected before appears in the For field.
5 Enter a summary description for the list.
6 Move to the Disposition Type field and click on the drop down buttons to select the desired disposal mode then click on the **Accept** button.
7 Perform one of the following operations :

- To add items, click on **Edit**->**Add Items**->**Boxes|Files**. A window appears.



Click on the **Add** button and select the desired items (they will appear highlighted) on the list that is displayed or click on the **Delete** button to remove items from the disposal list. As soon as a document is added to the disposal list, its state is changed to ON DISPOSAL in the Box and File modules.

Note : The documents added to the list must be IN. If they are not, the system will prevent their addition to the disposal list. An error message will also appear if there is a conflict with the disposal mode of a document or when a restriction is granted to a document.

- To add items by performing a search, click on **Edit**->**Add Items**->**Boxes|Files**. A window appears.

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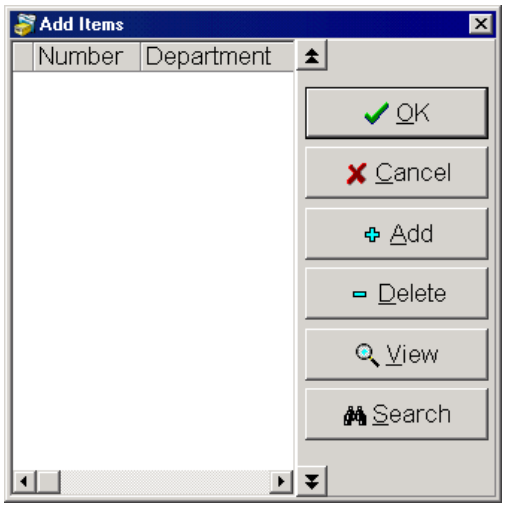
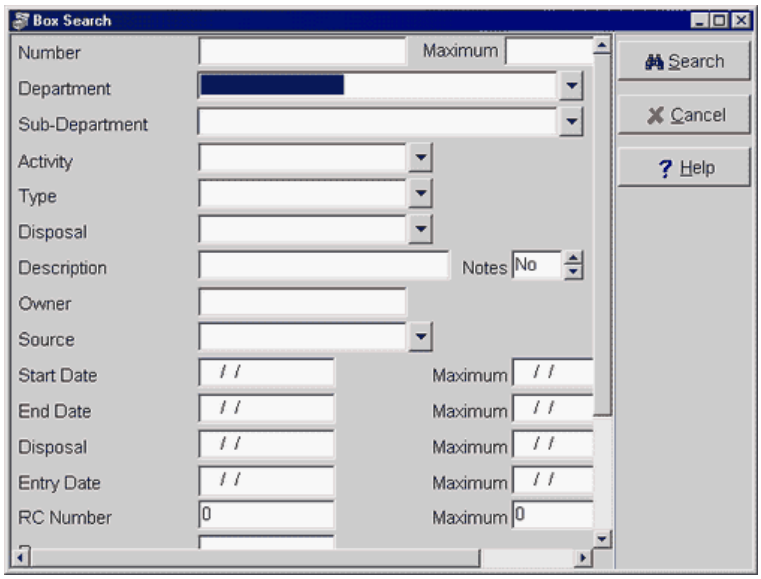


Click on the **Search** button. A new window opens on the screen.



Enter the desired search criteria and click on the **Search** button. The system proceeds to the search and automatically adds to the disposal list all the documents containing the specified search criteria. The search process is the same as when performing a search through the Search[486] module.

- To remove items, click on **Edit**->**Remove Items**. A window appears and asks to enter a number to indicate where to start in the selection list. Proceed and press **OK**. The list of items appears.

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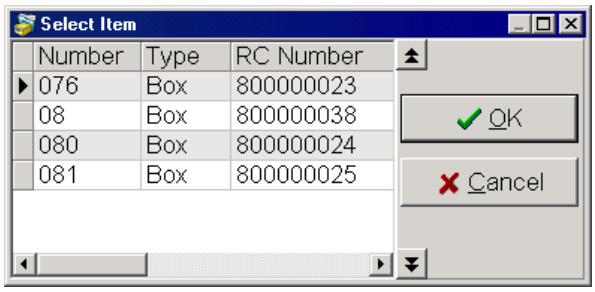
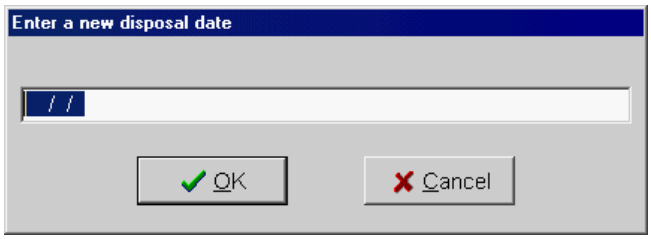


Note : This window contains all the items previously added to the disposal list.

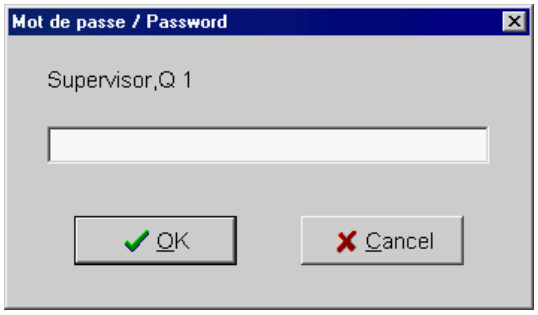
Select the desired items (they will appear highlighted) and press **OK**. The items are automatically removed from the disposal list and their state becomes IN.

- To remove items and edit their disposition date, click on **Edit**->**Remove Items, Change Date**. A window appears same as for a simple removal. Enter a number to indicate where to start in the selection list and press **OK**. A window appears, containing all the items previously added to the disposal list. Select an item and press **OK**. A new window opens on the screen.



Enter a new disposal date for the item and press **OK**. The box or file in question is removed from the list, its state becomes IN and its disposition date is updated in the Box and File modules.

- To add or edit notes, click on **Edit**->**Notes**. A report's window appears. Enter new notes or edit the existing ones and press **OK** when finished.
- To edit the disposal type, click on **Edit->Disposal Type Change**. A window appears.



Enter the password and press **OK**. A list of disposal types is shown. Select the type (it will appear highlighted) and press **OK**. The disposal type will be changed.

The disposal list is ready to be verified and to be sent to the customer. It will be necessary to wait for the signed authorization before proceeding to the disposal of the documents, according to the chosen disposal mode.

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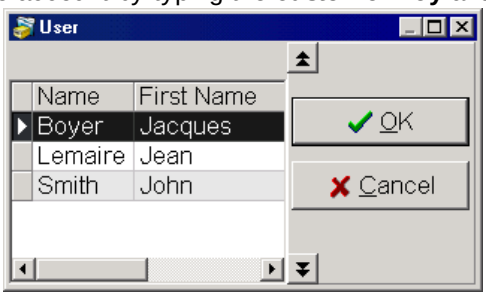
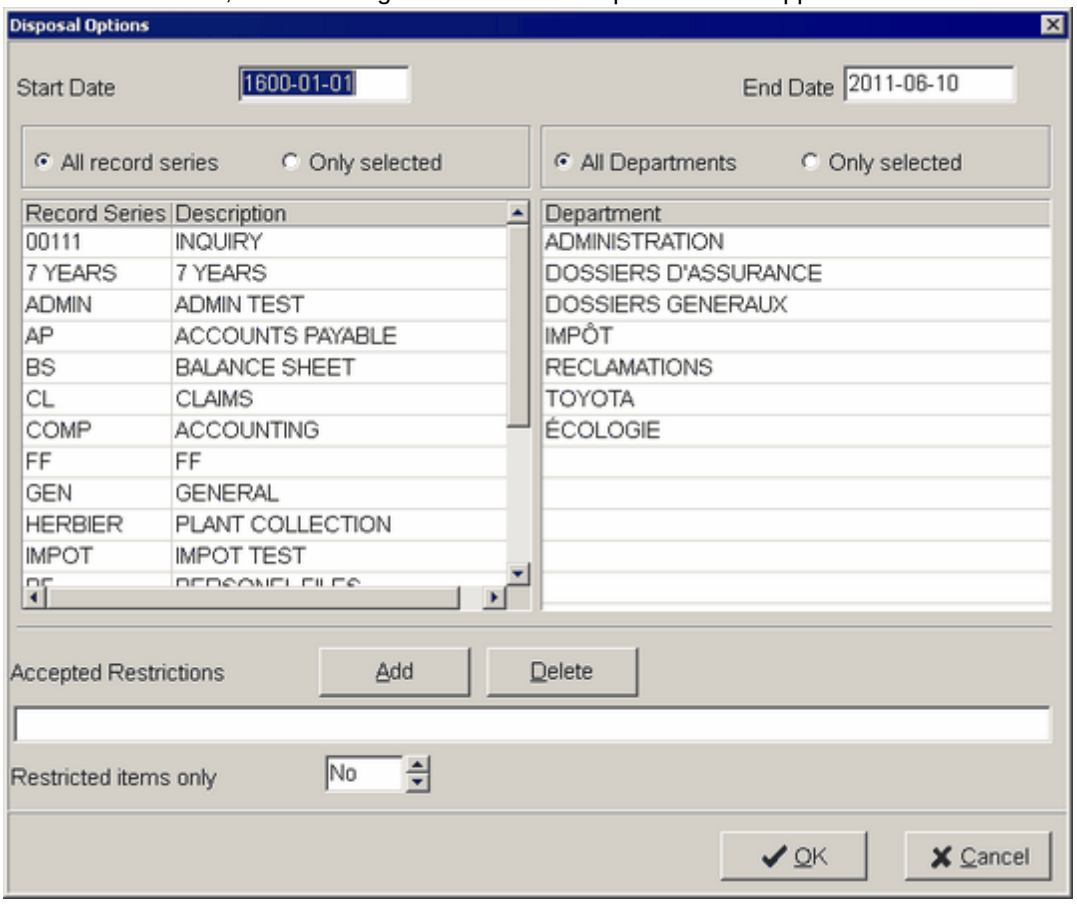
9.5.10.4 Auto-creating a disposal list

The auto-creation of a disposal list allows to batch add boxes that correspond to some given criteria and whose disposal dates are included in a same range of dates.

1. Open the **Inventory->Disposal List** module
2. From the menu, select **File->Auto Create**.
3. Specify the account by typing the **customer key** and pressing **enter** or pressing enter and selecting it from a list.



4. Select a user to sign for the list. (Note that the user can be changed until the time that the list is authorized.)
5. Enter a **description** for the list, and change the **disposal method** if desired.
6. Press **Ctrl-Enter**, or click the green check to accept. A window appears.



7. Set parameters for creating the disposal list.

Optional: change any of the following parameters to determine which boxes will be on the disposal list:

- Disposal date range (Defaults to from the earliest possible date, until today).
- Record series: Select All record series, or Only selected, and select one or more record series below)

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- Department: Select All departments, or Only selected, and select one or more departments below)
- Accepted restrictions: Use the Add or delete button to build a list of restrictions to accept. Set Restricted items only = Yes if this list should not include items without these restrictions.

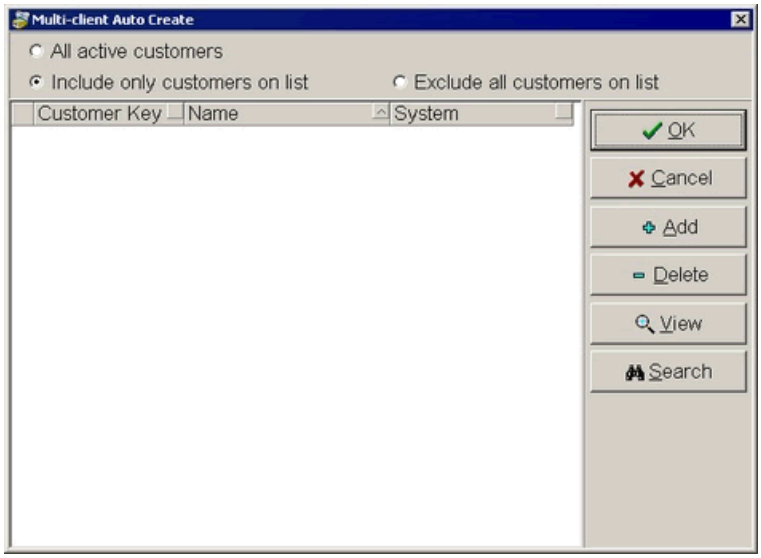
8. Click **OK** when done
9. A message indicating that one or more lists have been created. If lists are by department, the list will for each department will be named with the department name, followed by the description that you entered for the list in step 5 above.

The list is ready to be verified, printed and sent to the customer for authorization. Before being printed for authorization, items or notes can be manually added, edited or removed from the list, such as described in the step 6 of the previous section 539.

9.5.10.5 Auto-creating a disposal list for multiple clients

The Multi-client Auto Create option allows to batch add boxes from clients whose disposal dates are included in the same range of dates.

1 Click on **Inventory**->**Disposal List** from the Main window.
2 Click on **File**->**Multi-client Auto Create**. A window appears.



3 Select a type of list (All active customers / Include only customers on list / Exclude all customers on list)

- To add a customer to the list :

1 Press the **Add** button.
2 Select a customer (to have the list of customers press **OK ----** the customer selected will appear highlighted)

- To delete a customer from the list :

1 Select a customer in the list (it will appear highlighted)
2 Press the **Delete** button

- To add customers to the list by performing a search :

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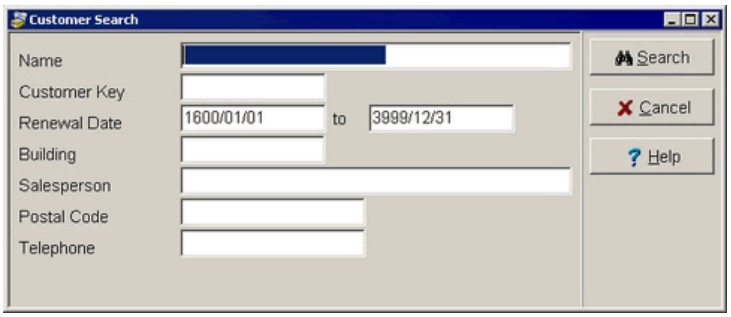
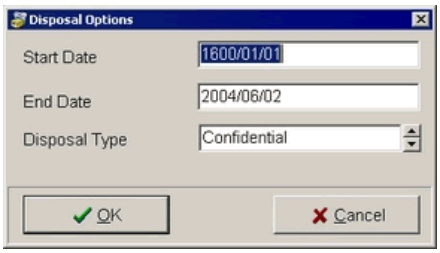
1 Click on the **Search** button. A window appears.



2 Enter the desired search criteria and click on the **Search** button. The system proceeds to the search and automatically adds to the disposal list all the documents containing the specified search criteria.

3 When all the changes and additions have been made to the list. Press **OK**. A window appears.



4 Select the different disposal options. Press **OK**.
5 The list will automatically be created and shown.

9.5.10.6 Authorizing a disposal list

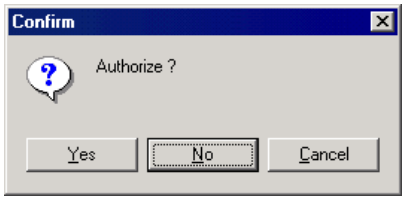
After having been created, a disposal list may be printed for authorization (see "Viewing the items on a disposal list 547") and sent to the customer. The customer will have to check the list, sign it and return it to the record center. The list is then ready to be processed as follows:

Authorizing the list

1. Open the **Inventory->Disposal List** module.
2. Navigate to the desired list, which will be in the CREATED or LOCKED state.
3. Verify that the signature is correct.

(In the case of lists auto-created by the record center, the signer might not be known in advance. To modify, press "**Ctrl-E**" to edit, **click** the For drop-down box, select the appropriate user, and press "**Ctrl-Enter**" to save)

4. From the menu, select **File->Authorize**. A dialog box appears.



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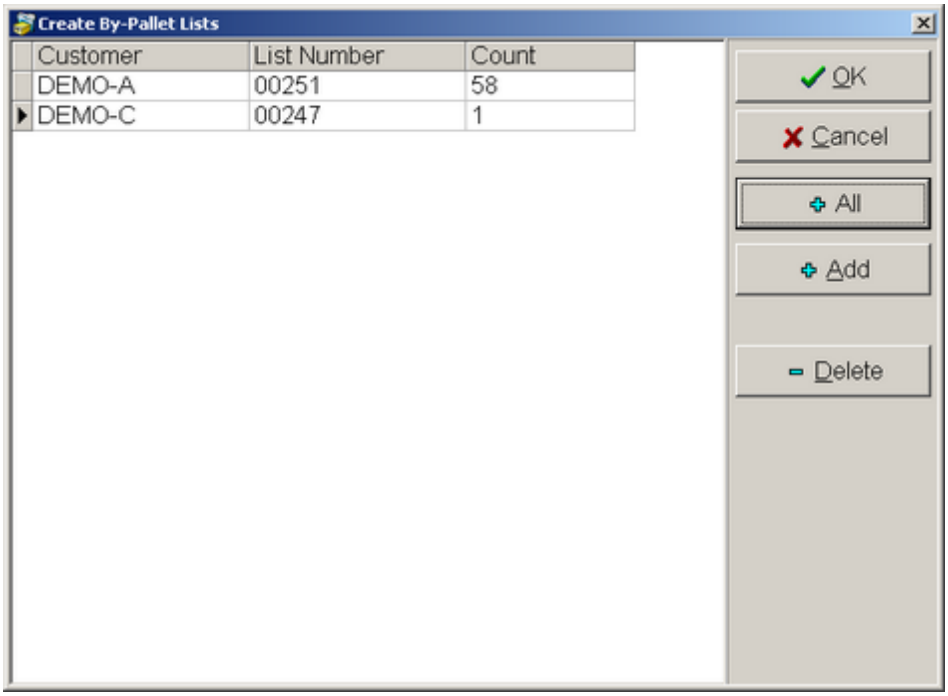
5. Click on the **Yes** button to confirm.

You may then proceed to create pallets for picking[545].

9.5.10.7 Creating destruction lists by-pallet

1 Click on **Inventory -> Disposal** list from the Main window.
2 Click on **File -> Create By-Pallet Lists**. A window appears, displaying the authorized lists and the number of boxes on each.



3 Specify the lists that will be on the final processing list

- To add all the lists that are in the Authorized state, click on the **All** button. The lists will be added automatically.

- To add a list press the **Add** button. Enter the customer key or press **OK** to have the list of customers (select a customer on the list, it will appear highlighted, and press **OK**). Press **OK**. Enter the list number and press **OK**.

- To delete a list from the selection, select a disposal list in the list (it will appear highlighted) and press the **Delete** button.

4 When all the changes have been made, press **OK**. A window appears.

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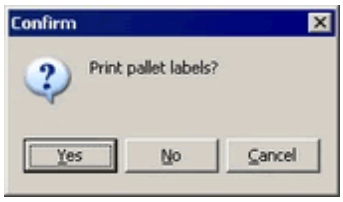


- To print the pallet labels, click on Yes. Pallet labels will automatically be printed on the default thermal printer.
- If you do not wish to print the labels click on No or Cancel.

9.5.10.8 Sending the pallet picking list to the PDT

1. Click on **Inventory -> Disposal list** from the Main window.
2. Click on **File ->Send Pallet picking list to PDT**
3. An information message appears asking to prepare the PDT.
4. Prepare the PDT to receive information by pressing **1-Receive**.

9.5.10.9 Receiving the pallet picking list from the PDT

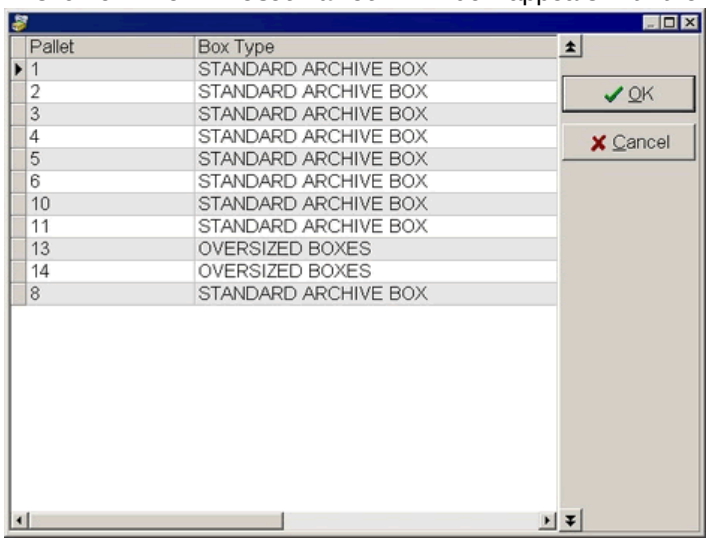
1. Click on **Inventory -> Disposal list** from the Main window.
2. Prepare the PDT to send information by pressing **2-Send Results -> 8-Pallet Pick**
3. Click on **File ->Receive Pallet picking list from PDT**

9.5.10.10 Receiving the pallet verification list from the PDT

1. Click on **Inventory -> Disposal list** from the Main window.
2. Prepare the PDT to send information by pressing **2-Send Results -> 9-Pallet Verif**.
3. Click on **File ->Receive Pallet Verification list from PDT**
4. As soon as the results are uploaded, a report of errors will be displayed.
5. If all the items have been verified, the system will ask you if you want to print the delivery slip. Click on **Yes** to print it, and **No** or **Cancel** to abort the printing.

9.5.10.11 Resetting a pallet

1. Click on **Inventory -> Disposal list** from the Main window.
2. Click on **File -> Reset Pallet**. A window appears with the list of all pallets that are not destroyed.



3. **Select** the pallet you want to reset (it will appear highlighted) and press **OK**.
4. The pallet picking list will be reset (the pallet will appear on the list when sending a pallet picking list

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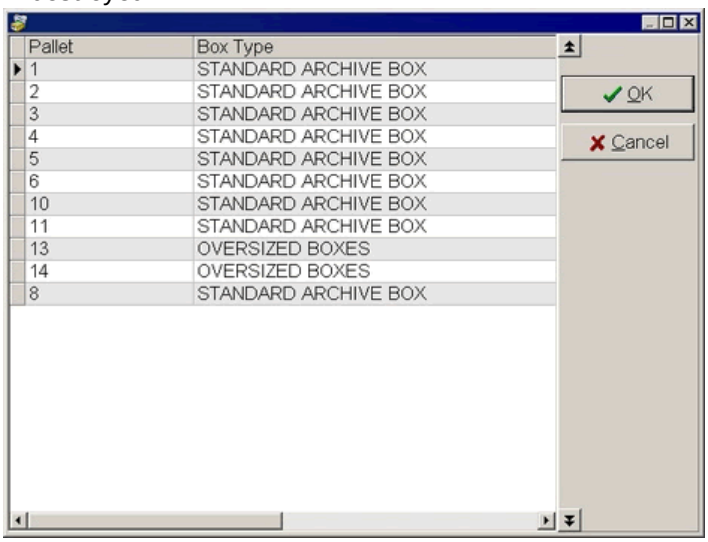
to the PDT).

9.5.10.12 Reprinting pallet labels

1. Click on **Inventory -> Disposal list** from the Main window.
2. Click on **File -> Reprint Pallet Label**. A window appears with the list of all pallets that are not destroyed.



3. **Select** all the pallet labels you want to reprint (they will appear highlighted) and press **OK**.
4. The labels will be printed on the thermal printer.

9.5.10.13 Using the PDT when destroying by pallet

*Picking items to put on a pallet

1. Send the pallet picking list to the PDT[546]
2. On the PDT press **3-Processing -> 8-Pallet Pick**
3. Press the number of the list you want to pick
4. **Scan** the pallet label
5. Pick and scan the items that appear on the screen
6. When all the items have been picked, the PDT goes back to the main menu
7. Send the pallet picking list back to the software[546]

*Verifying items on a pallet

1. On the PDT press **3-Processing -> 9-Pallet Verify**.
2. Scan the pallet label
3. Scan all the items on the pallet
4. When all items are scanned, scan the pallet label to close the list.
5. Send the pallet verification list back to the software[546]

9.5.10.14 Viewing the items on a disposal list

1 Click on **Inventory**->**Disposal List** from the Main window.
2 Find the desired list and keep it on the screen.
3 Click on **View**->**Items**. The report's window opens.

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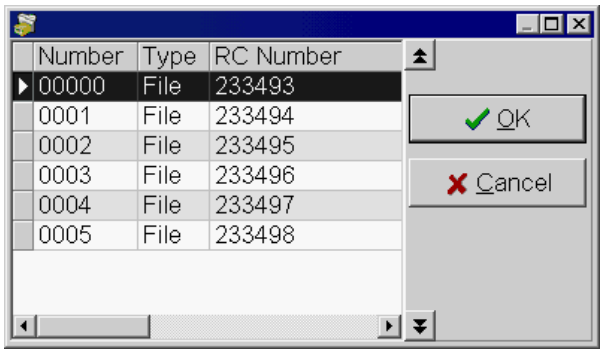
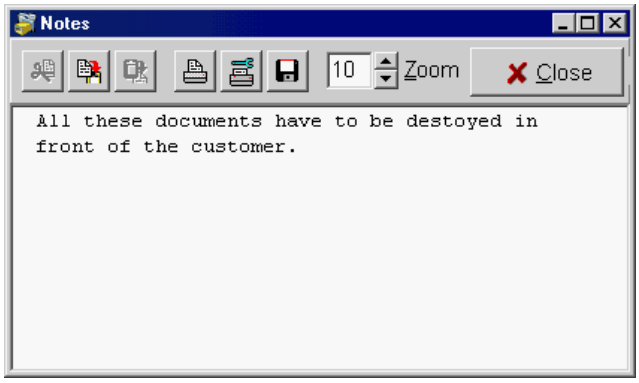


4 Press **OK** when finished.

9.5.10.15 Viewing or editing notes on a disposal list

1 Click on **Inventory**->**Disposal List** from the Main window.
2 Find the desired list and keep it on the screen.
3 Click on **View**->**Notes**. The report's window appears.

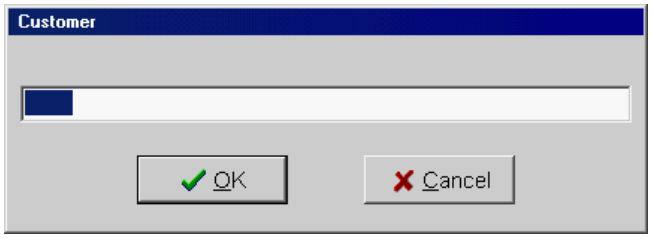


4 Click on the **Close** button to terminate the viewing.

9.5.10.16 Viewing authorized users who can approve disposal lists

The report produced here includes all the users that were authorized, at the record center, to sign disposal lists (settings of the Authorized User module).

1 Click on **Inventory**->**Disposal List** from the Main window.
2 Click on **View**->**Authorized Users**. A window appears.



3 Enter the code of the customer in question and press **OK**. The report is automatically produced.

Note : When the customer is billed by department (settings of the Customer Information module), the

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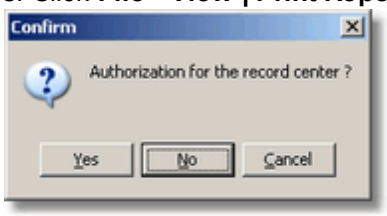
report is divided and displayed consequently.

9.5.10.17 Viewing or printing items to be disposed of

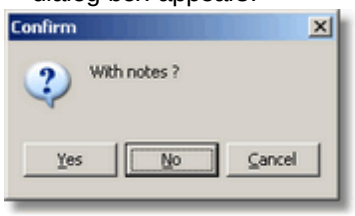
Which lists are available and what can be done with them depends on the state of the list.

The list is in the CREATED state

1. Click the Inventory->Disposal List module from the Main Window.
2. Navigate to the desired disposal list
3. Click **File->View | Print Report->For customer**. A dialog box appears



4. Click **Yes** if this is the listing that will be sent to the customer for authorization. In this case, the report will include spaces for the customer to approve each box or enter an new date, and a space at the bottom for the customer to provide a signature authorizing the disposal list. Otherwise, click **No**. A dialog box appears.



5. Click **Yes** to include box and file notes of up to 500 characters for items that have them. Otherwise, click **No**.
6. A report will appear or be printed. If the list was printed for authorization, the list will go to the **Locked** state, preventing differences between the list that the customer approves and the list that is in the system.

9.5.10.18 Viewing or printing the items on a pallet

1 Click on **Inventory**->**Disposal List** from the Main window.
2 Click on **File**->**View**|**Print Report -> Pallet.**
3 The list of pallets that have not been destroyed appears. Select one or many pallets (they will appear highlighted) and press **OK**.
4 The report(s) are automatically printed or shown.

9.5.10.19 Deleting images and documents related to a pallet

When a pallet is verified for destruction[546], images in the destroyed files are automatically deleted. If there was a problem and a pallet was destroyed without the associated images and documents being deleted, a list will appear in the daily tasks[679] report. It is possible to delete them as follows:

1. From the **Inventory->Disposal list** module, select **File->Processing->Delete images/documents related to pallet**.
2. Scan or enter the pallet bar code.

EDC will repeat the deletion of the images. (If difficulties persist, please contact support@docudatasoft.com.)

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9.5.10.20 Viewing or printing the pallets included in a list

1 Click on **Inventory**->**Disposal List** from the Main window.
2 Search for the wanted disposal list and keep it on the screen.
3 Click on **File**->**View|Print Report -> Pallets for list.**
4 The report is automatically printed or shown.

9.5.10.21 Viewing or printing volume of boxes to be disposed of

The report produced here can be shown to the customer, in order to give him the exact volume of boxes to dispose of and to evaluate the costs.

This report only includes the volume of boxes. For files, the report will be empty, since a file does not have a storage volume assigned. It will be the responsibility of the record center to manually bill the disposal of the files.

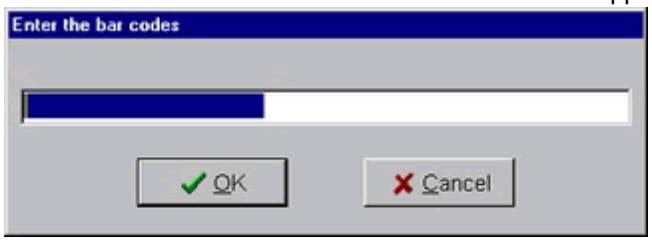
1 Click on **Inventory**->**Disposal List** from the Main window.
2 Find the desired list and keep it on the screen.
3 Click on **File->View| Print Report->Volume.** The report is automatically printed or displayed.

Note : For customers which are billed by department, the report will be divided consequently. The report is also divided by record series when departments are associated to record series (settings in the Customer Information[246] and Retention Schedule[315] modules).

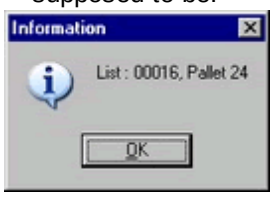
9.5.10.22 Finding a disposal list

This is normally used when one wants to find on which destruction list a box is on. It can be used if a box is misplaced on another pallet by an employee; this feature facilitates the correction of mistakes.

1. Click on **Inventory->Disposal List** from the Main window.
2. Click on **File->Find destruction list**. A window appears.



3. Enter the box's bar code manually or with the keyboard-wedge scanner. Press **OK**.
4. An information window appears, giving the list number and the pallet number on which the box is supposed to be.



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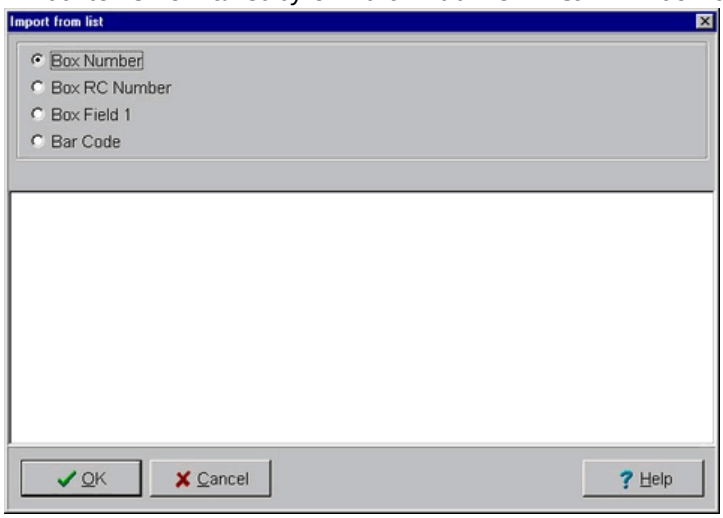
9.5.10.23 Editing or deleting a CREATED disposal list

Editing a list

1. Click on **Inventory->Disposal List** from the Main window.
2. Find the desired list and keep it on the screen.
3. The status of the list must be CREATED
4. Perform one of the following operations (details in the "Manually creating a disposal list 539 " section).

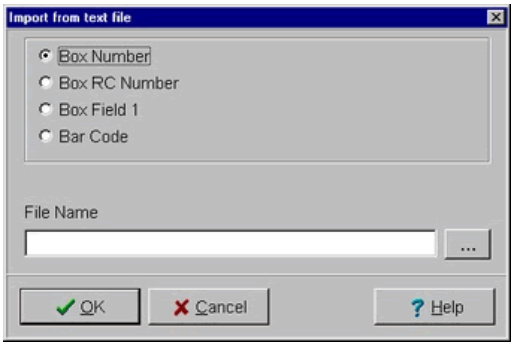
- Add items by clicking on **Edit->Add Boxes**. In order to be added the documents must be IN.
- Add items from a list by on **Edit->Add from list**. A window appears



Check off the related option and write the corresponding information in the empty field at the bottom and press OK. Example: if you want to add boxes by box number, check the Box number option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

- Add items from a list by on **Edit->Add from text file**. A window appears



According to the record series that is added, check off the related options. Example: if you want to add boxes by box number, check the Box number option.

Enter a text file name or scroll the directories to find the right text file and press OK.

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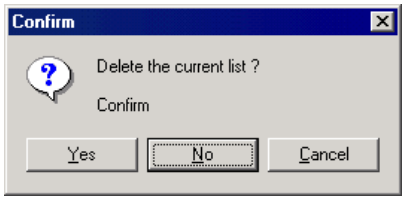
Note : The files that allow to add boxes that way must be text files and can only contain numbers displayed in columns.

- · Delete items by clicking on Edit->Remove Items.
- Delete items and change the date of the list by clicking on Edit->Remove items,Change Date
- · Add, edit or delete a note from the list by clicking on Edit->Notes. Edit the list's description by clicking on Edit->Edit and by entering a new description in the appropriate field.

*Deleting a list

1. Click on **Inventory->Disposal List** from the Main window.
2. Find the desired list and keep it on the screen.
3. The status of the list must be CREATED, LOCKED or AUTHORIZED.
4. Click on **File->Delete List**. A dialog box appears.



5. Click on the **Yes** button to confirm the deletion.

9.5.10.24 Removing items from an AUTHORIZED or LOCKED disposal list

1. Open the **Inventory->Disposal List** module.
2. Navigate to the desired list.
3. If the status of the list is AUTHORIZED or LOCKED, you will have the option to select **Edit -> Remove Authorized Items**.
4. A window appears. Enter a password and press **OK**.
5. Enter the number of the item you want to remove and press **OK**.
6. A list of the items on the transfer list appears; highlight the items you want to remove and press **OK**.
7. The selected items will not longer be on the disposal list.

9.5.11 Transfer List

9.5.11.1 Overview (Transfer List)

The Transfer List module enables record centers to systematically transfer lists of boxes permanently out of the record center, at the request of a customer. See the procedures section 190 for links to the steps in the process.

Available reports

- picking list of documents to be transferred
- list of documents to be transferred
- authorization list for documents to be transferred
- volume of boxes to be transferred

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Fields[554] (see the next section)

Tasks

- Using the PDT when transferring documents[560]
- Viewing or printing documents to be transferred[561]
- Viewing or printing the items on a pallet[562]
- Viewing or printing the pallets included on a list[562]
- Editing or deleting a CREATED transfer list[563]

Distinctive menu options:

File menu

- Create list (Manually creating a list of documents to transfer)[554]
- Auto-create (Auto-creating a list of documents to transfer[556])
- Authorize (Authorizing a transfer list[559])
- Create by-pallet lists (Creating By-Pallet transfer lists)[557]
- Processing

o Sending the Pallet picking list to the PDT[558]
o Receiving the Pallet picking list from the PDT[558]
o Receiving the Pallet Verification list from the PDT[558]
o Resetting a Pallet[559]
o Reprinting Pallet labels[559]

- Find transfer list[562]

View menu

- Items (Viewing the items on a transfer list)[562]
- Notes (Viewing notes on a transfer list[548])

Edit menu

- Add boxes[554]
- Add from list[554]
- Add from text file[554]
- Notes[560]
- Remove items[563]
- Remove authorized items (Removing items from an AUTHORIZED or LOCKED transfer list[564])

Module window:

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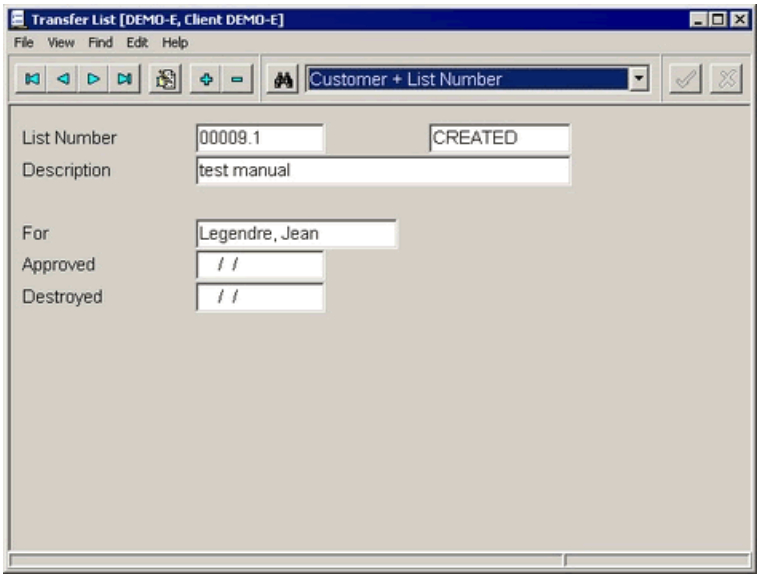

9.5.11.2 Fields (Transfer List)

List Number
Number generated by the system to identify the list. A number with a decimal indicates that the list has been reset so that changes could be made

Status
Indicates where the list is in the treatment process :

CREATED : the list is being created (it can still be edited for changes or deleted);
LOCKED : the list has been printed for authorization and sent to the customer. It cannot be edited or deleted, unless it is reset;
AUTHORIZED : the list has been returned to the record center, properly signed and authorized. It cannot be edited or deleted;
TRANSFERRED : the list has been processed and the concerned documents have been transferred to the site.

Description
Summary description of the current list.

For
Indicates the authorized user (the requester) for which the list has been created.

Approved
Indicates the date when the list has been authorized.

Processed
Indicates the date when the list has been processed.

9.5.11.3 Manually creating a list of documents to transfer

The major characteristic of a transfer list manually created is the addition of the items one by one. That way, any customer demand can be answered easily.

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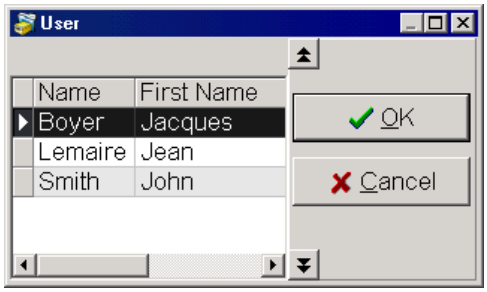
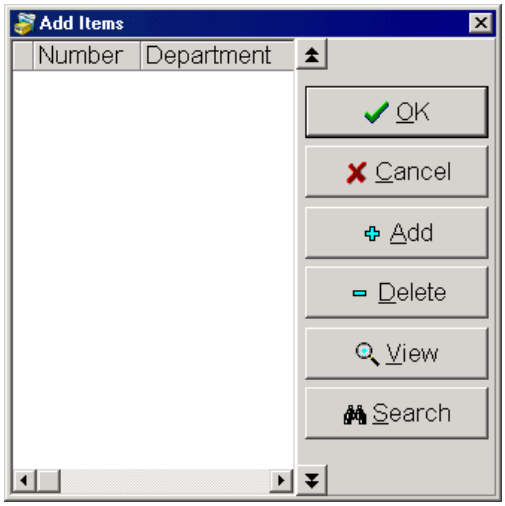
1 Click on **Inventory**->**Transfer List** from the Main window.
2 Click on **File**->**Create List**. A window appears and asks to enter a customer code.
3 Enter the code of the desired customer and press **OK**. A new window opens.



4 Select a user and press **OK**. The system generates a new list whose number follows the number of the last list created for that customer. The user selected here appears in the For field.
5 Enter a summary description for the list in the Description field and click on the **Accept** button.
6 Perform one of the following operations :

- To add items, click on **Edit**->**Add Items**->**Boxes|Files**. A window appears.



Click on the **Add** button. A window appears and asks to enter a box or file number. Enter the desired number and click on the **Accept** button. Proceed as many time as desired and press **OK** when finished.

Note : The state of every item added to the list becomes ON TRANSFER in the Box and File modules. In order to be added to the list, the initial state of these documents must be IN. If it is not, an error message will appear.

- To remove items, click on **Edit**->**Remove Items**. A window appears.

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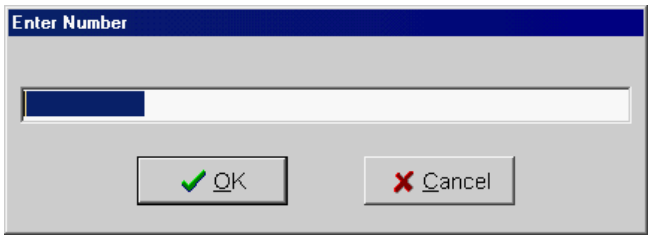
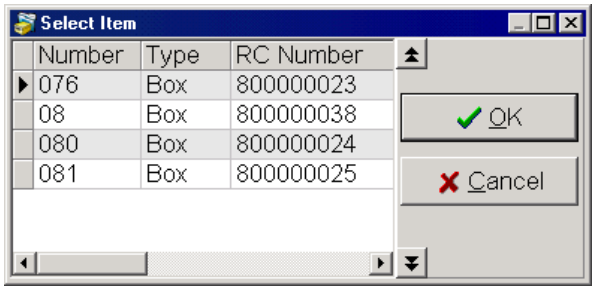


Enter a number to indicate where to start in the selection list and click on the **Accept** button. The list of items appears.



Select the desired items (they will appear highlighted) and press **OK**. The selected items are automatically removed from the transfer list and their state becomes IN.

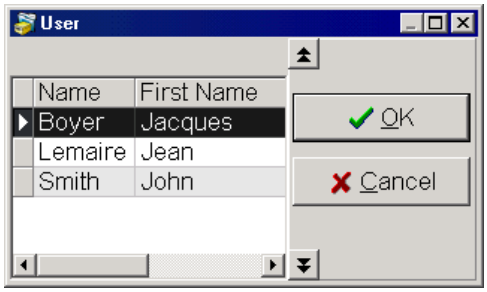
- To add or edit notes, click on **Edit**->**Notes**. A text window opens on the screen. Enter the desired notes or modify the existing notes and press **OK**.

7 The list is ready for verification and sending to the customer. It will be necessary to wait for the signed authorization from the customer to transfer the documents.

9.5.11.4 Auto-creating a list of documents to transfer

The auto-creation of a transfer list allows to batch add boxes that correspond to given criteria. This procedure can be useful when all the boxes of a department for one customer need to be transferred.

1 Click on **Inventory**->**Transfer List** from the Main window.
2 Click on **File**->**Auto Create**. A window appears and asks to specify which customer is concerned.
3 Enter the code of the customer in question and press **OK**. A window appears.



4 Select a user and press **OK**.
5 Enter a summary description in the Description field and click on the **Accept** button. A window opens.

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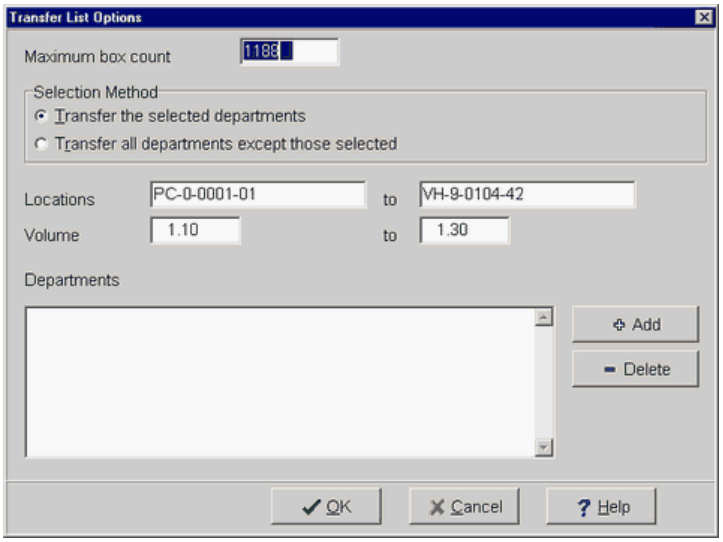

Maximum box count : this field allows to enter a maximum quantity of boxes that can be added on the list. If the boxes that correspond to the next criteria is more important than that quantity, the system will stop to add items on the transfer list. Items may be added manually, such as described in the previous section.

Selection Method : according to the checked option, this field allows to specify if the system must add all the documents that belong to the selected departments or if all the documents must be added, except for the ones that belong to these departments.

Locations : this field allows to enter a range of locations to take into account when adding items to the list.

Volume : this field allows to indicate a range of volume to take into account when adding boxes to the list.

Departments : by clicking on the **Add** and **Delete** buttons located to the right of the field, it is possible to establish a list of the departments to exclude or include to the transfer list. This field is related to the selection method set previously.

6 Enter the desired selection criteria in the appropriate fields and press **OK** to register the selection. The system automatically sorts and adds the items accordingly.

The list is ready to be verified, printed and sent to the customer for authorization. Before being printed for authorization, items or notes can be manually added, edited or removed from the list, such as described in the step **6** of the previous section 554.

9.5.11.5 Creating By-Pallet Transfer Lists

1. Click on **Inventory -> Transfer List** from the Main window.
2. Click on **File -> Create By-Pallet Lists**. A window appears, displaying the authorized lists and the number of boxes on each.

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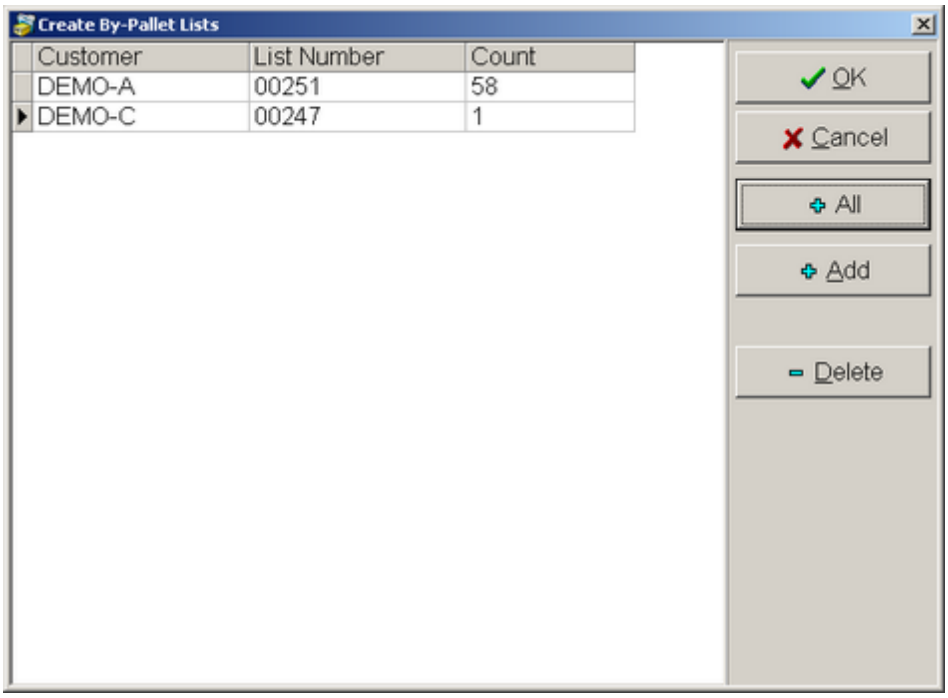

3. Specify the lists that will be on the final processing list
- To delete a list, select a transfer list in the list (it will appear highlighted) and press the **Delete** button.
- To add a list press the **Add** button. Enter the customer key or press OK to have the list of customers (select a customer on the list, it will appear highlighted, and press **OK**). Press **OK**. Enter the list number and press **OK**.
- To add all the lists that are in the Authorized state, click on the **All** button.

4. When all the changes have been made, press **OK**. Pallet labels will automatically be printed on the default thermal printer.

9.5.11.6 Sending the Pallet Picking List to the PDT

1. Click on **Inventory -> Transfer List** from the Main window.
2. Click on **File ->Send Pallet picking list to PDT**
3. An information message appears asking to prepare the PDT.
4. Prepare the PDT to receive information by pressing **1-Receive**.

9.5.11.7 Receiving the Pallet Picking List from the PDT

1. Click on **Inventory -> Transfer list** from the Main window.
2. Prepare the PDT to send information by pressing **2-Send Results -> 8-Pallet Pick**
3. Click on **File ->Receive Pallet picking list from PDT**

9.5.11.8 Receiving the Pallet Verification list from the PDT

1. Click on **Inventory -> Transfer List list** from the Main window.
2. Prepare the PDT to send information by pressing **2-Send Results -> 8-Pallet Pick**
3. Click on **File ->Receive Pallet Verification list** from PDT
4. As soon as the results are uploaded, a report of errors will be displayed.
5. If all the items have been verified, the system will ask you if you want to print the delivery slip. Click on Yes to print it, and No or Cancel to abort the printing.

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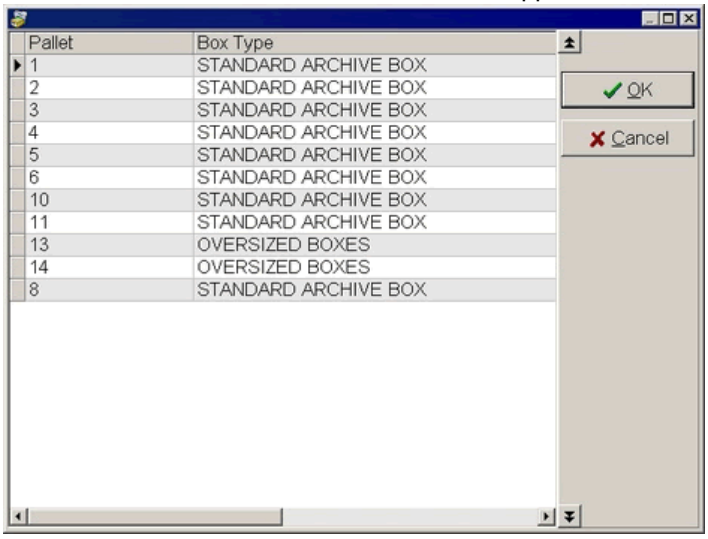
9.5.11.9 Resetting a Pallet

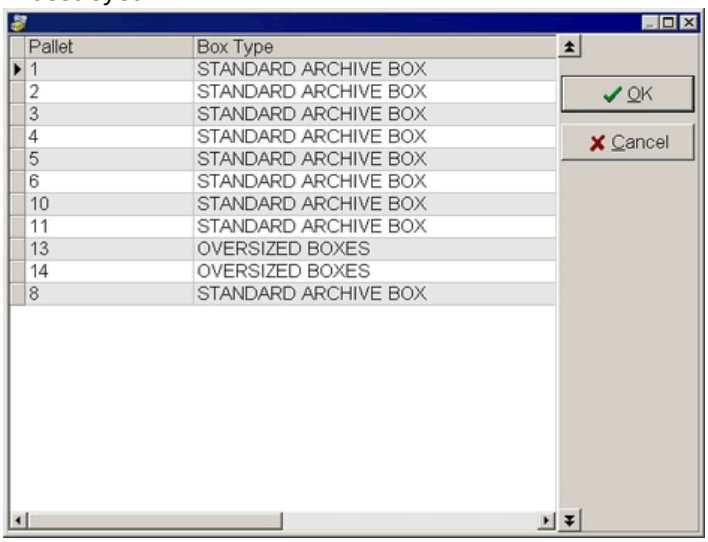
1. Click on **Inventory -> Transfer List** from the Main window.
2. Click on **File -> Reset Pallet**. A window appears with the list of all pallets that are not destroyed.



3. Select the pallet you want to reset (it will appear highlighted) and press **OK**.
4. The pallet picking list will be reset (the pallet will appear on the list when sending a pallet picking list to the PDT).

9.5.11.10 Reprinting pallet labels

1. Click on **Inventory -> Transfer List** from the Main window.
2. Click on **File -> Reprint Pallet Label**. A window appears with the list of all pallets that are not destroyed.



3. Select all the pallet labels you want to reprint (they will appear highlighted) and press **OK**.
4. The labels will be printed on the thermal printer.

9.5.11.11 Authorizing a transfer list

After having been created, a transfer list may be printed for authorization (see "Viewing the items on a transfer list 562") and sent to the customer. The customer will have to check the list, sign it and return it to the record center. The list is then ready to be processed.

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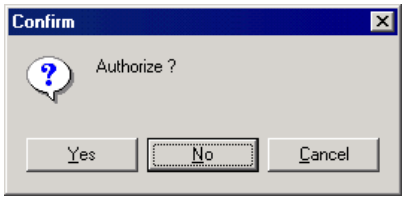
Consequently, the processing of the list must respect the following steps in that order : the authorization of the list, the picking of the items, the verification of the picked items and the transfer of these items to another site.(See also the Permanently transferring items to another site[190] topic.)

For the subsequent operation, we will consider that a transfer list has been created and locked, and that the list is on the screen and is waiting to be processed.

*Authorizing the list

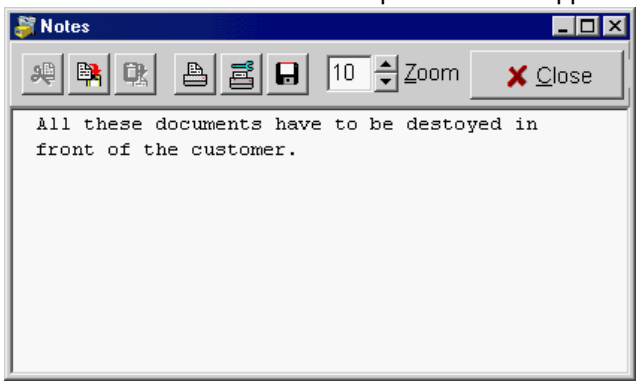
1. Click on **Inventory->Destruction List** from the Main window.
2. Find the desired list and keep it on the screen. Its status must be CREATED or LOCKED.
3. Click on **File->Authorize**. A dialog box appears.



4. Click on the **Yes** button to confirm the operation The status of the list becomes AUTHORIZED and the items can be picked.

9.5.11.12 Viewing or editing notes on a disposal list

1. Click on **Inventory->Disposal List** from the Main window.
2. Find the desired list and keep it on the screen.
3. Click on **View->Notes**. The report's window appears.



4. Click on the **Close** button to terminate the viewing.

9.5.11.13 Using the PDT when transferring documents

Picking items to put on a pallet

1. Send the pallet picking list to the PDT[558]
2. On the PDT press **3-Processing -> 8-Pallet Pick**
3. Press the number of the list you want to pick

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4. Scan the pallet label
5. Pick and scan the items that appear on the screen
6. When all the items have been picked, the PDT goes back to the main menu
7. Send the pallet picking list back to the software[558]

Verifying items on a pallet

1 On the PDT press **3-Processing -> 9-Pallet Verify**.
2 Scan the pallet label
3 Scan all the items on the pallet
4 When all items are scanned, scan the pallet label to close the list.
5 Send the pallet verification list back to the software[558]

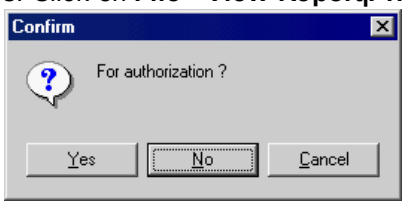
9.5.11.14 Viewing or printing documents to be transferred

The list is CREATED

When a transfer list is being created, only the report for the customer (for authorization or not) can be printed or displayed.

Note : When displaying the report the list is not modified, even if it is for authorization. But when printing the report, the status of the list becomes LOCKED.

1. Click on **Inventory->Transfer List** from the Main window.
2. Find the desired list and keep it on the screen.
3. Click on **File->View Report|Print Report->For customer**. A dialog box appears.



4. Click on the **Yes** button or on the **No** button, according to the report that must be produced. The system automatically displays the report's window or prints the list from the default printer. As soon as the report is printed, the list will be changed to the LOCKED state.

Note : When producing a report for authorization, it will contain boxes to check off and spaces where to sign, since the transfer lists have to be approved by the customer.

The list is LOCKED

When a transfer list is locked, it is possible to produce a report for the customer.

1. Click on **Inventory->Transfer List** from the Main window.
2. Find the desired list and keep it on the screen.
3. Click on **File->View Report|Print Report->For customer**
4. When producing the report for a customer, proceed such as describe above.

Note : For customers which are billed by department, the report will be divided consequently. The report is also divided by record series when departments are associated to record series (settings in the Customer Information[246] and Retention Schedule[315] modules).

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9.5.11.15 Viewing or printing the items on a pallet

1. Click on **Inventory->Transfer List** from the Main window.
2. Click on **File->View|Print Report -> Pallet**.
3. The list of pallets that have not been destroyed appears. Select one or many pallets (they will appear highlighted) and press **OK**.
4. The report(s) are automatically printed or shown.

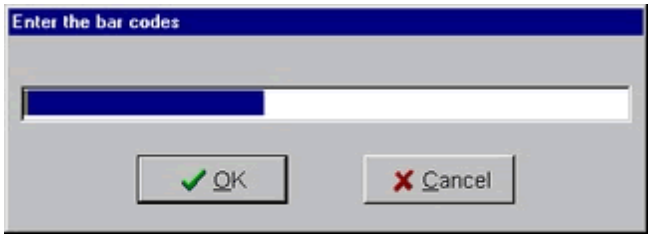
9.5.11.16 Viewing or printing the pallets included on a list

1. Click on **Inventory->Transfer List** from the Main window.
2. Search for the wanted disposal list and keep it on the screen.
3. Click on **File->View|Print Report -> Pallets for list**.
4. The report is automatically printed or shown.

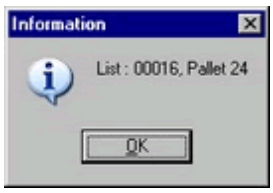
9.5.11.17 Finding a transfer list

This is normally used when one wants to find on which transfer list a box is on. It can be used if a box is misplaced on another pallet by an employee; this feature facilitates the correction of mistakes.

1 Click on Inventory->Transfer List from the Main window.
2 Click on File->Find transfer list. A window appears.



3 Enter the box's bar code manually or with the keyboard-wedge scanner. Press OK.
4 An information window appears, giving the list number and the pallet number on which the box is supposed to be.



9.5.11.18 Viewing the items on a transfer list

1. Click on **Inventory->Transfer** List from the Main window.
2. Find the desired list and keep it on the screen.
3. Click on **View->Items**. The report's window appears.

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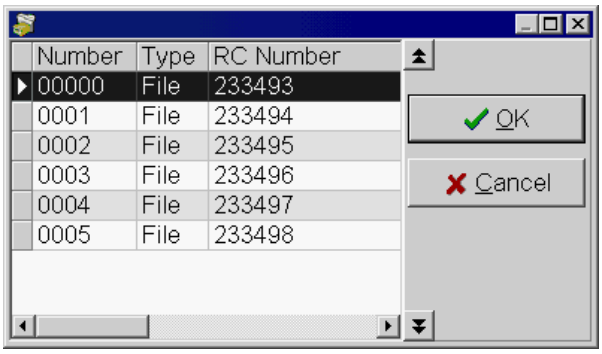


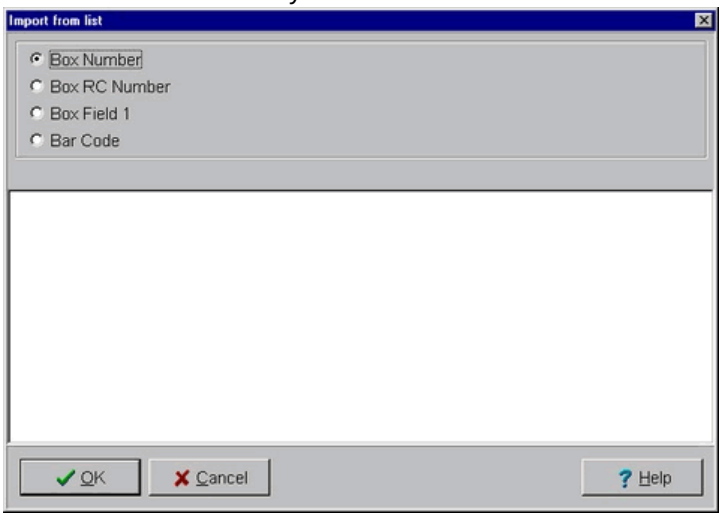
4. Press **OK** to end the viewing.

9.5.11.19 Editing or deleting a CREATED transfer list

Editing a list

1. Click on **Inventory->Transfer List** from the Main window.
2. Find the desired list and keep it on the screen.
3. The status of the list must be CREATED
4. Perform one of the following operations (details in the "Manually creating a list of documents to transfer[554] " section).

- · Add items by clicking on **Edit->Add Boxes**. In order to be added the documents must be IN.
- Add items from a list by on **Edit->Add from list**. A window appears



Check off the related option and write the corresponding information in the empty field at the bottom and press OK. Example: if you want to add boxes by box number, check the Box number option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

- Add items from a list by on **Edit->Add from text file**. A window appears

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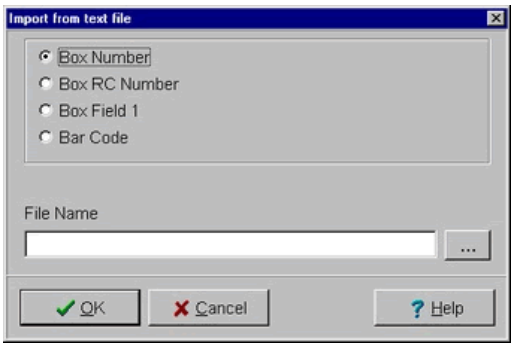


According to the record series that is added, check off the related options. Example: if you want to add boxes by box number, check the Box number option.

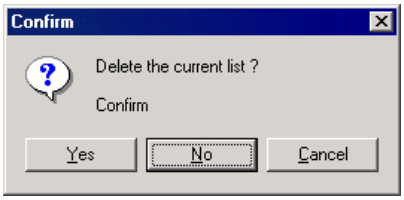
Enter a text file name or scroll the directories to find the right text file and press OK.

Note : The files that allow to add boxes that way must be text files and can only contain numbers displayed in columns.

- Delete items by clicking on **Edit->Remove Items**.
- Add, edit or delete a note from the list by clicking on **Edit->Notes**. Edit the list's description by clicking on **Edit->Edit** and by entering a new description in the appropriate field.

Deleting a list

1. Click on **Inventory->Transfer List** from the Main window.
2. Find the desired list and keep it on the screen.
3. The status of the list must be CREATED, LOCKED or AUTHORIZED.
4. Click on **File->Delete List**. A dialog box appears.



5. Click on the **Yes** button to confirm the deletion.

9.5.11.20 Removing items from an AUTHORIZED or LOCKED transfer list

1. Click on **Inventory->Transfer List** from the Main window.
2. Find the desired list and keep it on the screen.
3. The status of the list must be AUTHORIZED or LOCKED.
4. Click on **Edit -> Remove Authorized Items**. A window appears.
5. Enter a password and press **OK**.
6. Enter the number of the item you want to remove and press **OK**.
7. A list of the items on the transfer list appears, select the items you want to remove (they will appear highlighted) and press **OK**.
8. The items previously selected will be removed from the list.

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9.5.12 Deletion List

9.5.12.1 Overview (Deletion List)

If items that are OUT to a customer will not be returned to the record center, they can be marked as DELETED from inventory using this module. This cancels future storage charges, but does not erase the information from the database. It is possible to return DELETED items to inventory, at which time storage for boxes would be reinstated.

Customers with sufficient web licenses and user rights may also create and process deletion lists using ActiveWeb.

Available reports

- List of documents to be deleted 571
- Volume of boxes to be deleted 571
- (See the Report 501 module for additional reports)

Fields 566 (see the next section)

Tasks

- Creating a deletion list 566
- Editing or deleting a deletion list 569
- Deleting documents from inventory 569
- Viewing the items on a deletion list 570
- Viewing notes on a deletion list 570
- Viewing or printing documents to be removed from the inventory 571
- Viewing or printing volume of boxes to be removed from the inventory 571

Distinctive menu options:

File menu

- Create list 566
- Delete list 569
- Processing -> (Authorize | Destroy list) 569
- View | Print volume 571

View menu

- Items 570
- Notes 570

Edit menu

- Add boxes 566
- Add files 566
- Add from list 566
- Add from text file 566
- Notes 566
- Remove items 569
- Remove authorized items 569

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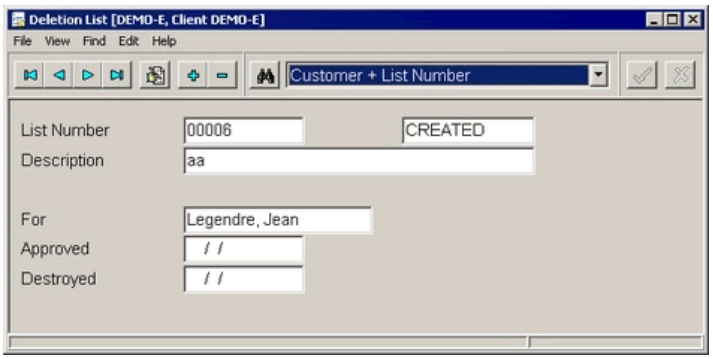
Module window:



9.5.12.2 Fields (Deletion List)

List Number
Number generated by the system to identify this list. A number with a decimal indicates that this list has been reset so that changes could be made.

State
Indicates where the list is in the treatment process.

CREATED : the list is being created (it can be edited or deleted).
LOCKED : the list has been printed for verification (it cannot be deleted or modified without being reset).
AUTHORIZED : the customer has provided signed authorization for removing these items from inventory.
DELETED : the list has been processed and the related storage fees have been canceled.

Description
Summary description of the current list.

For
Indicates the authorized user for which the list has been created.

Authorized
Indicates the date when authorization was entered, and the employee who verified it.

Destroyed
The date when the list was processed and items were marked as deleted.

9.5.12.3 Creating a deletion list

The deletion process is similar to the disposal or the transfer process, except that the boxes are not at the record center. Documents are marked as DELETED but their information is retained in the database.

If a deleted document is returned to the record center later, the box will automatically be returned to the in state and storage charges for this item will resume.

Note that customers may also process their own deletion lists using ActiveWeb. (See ActiveWeb documentation for further details.)

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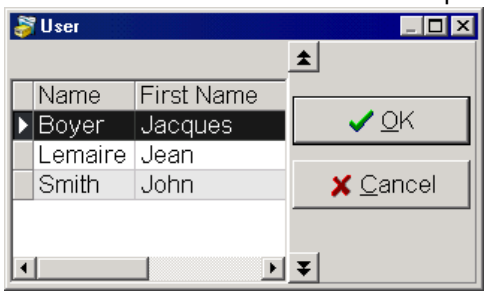
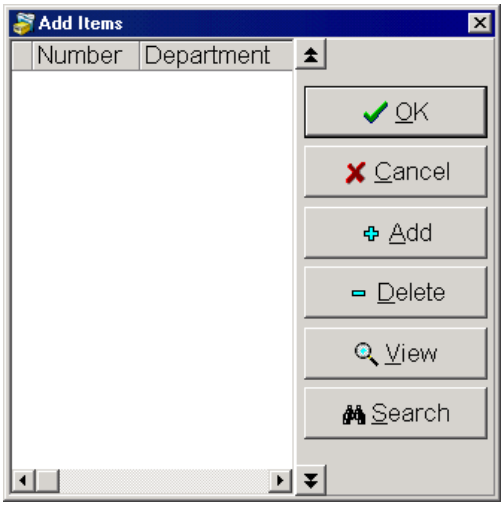
1. Click on **Inventory->Deletion List** from the Main window.
2. Click on **File->Create List**. A window appears and asks to enter the customer key.
3. Enter the code of the desired customer and press **OK**. A new window opens.



4. Select a user and press **OK**. The system generates a new list whose number follows the number of the last created list for this customer. The user selected here will appear in the For field.
5. Enter a summary description for the list in the Description field and click on the **Accept** button.
6. Perform one of the following operations :

- To add items, click on **Edit->Add Items->Boxes|Files**. A window appears.



Click on the **Add** button. A window appears and asks to enter a box or file number. Enter the desired number and click on the **Accept** button. Proceed as many time as desired and press **OK** when finished.

Note : The state of every item added to the list becomes ON DELETION in the Box and File modules. In order to be added to the list, the initial state of these documents must be OUT. If not, an error message will appear.

- To add items from a list, click on **Edit->Add** from list. A window appears.

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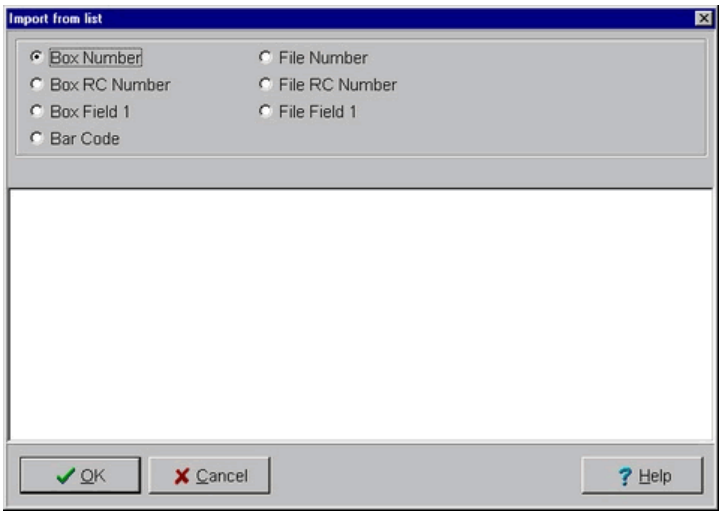
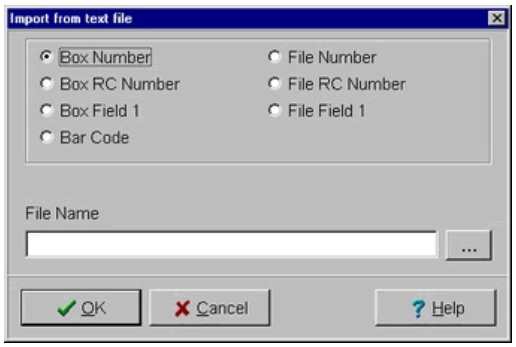


Check off the related option and write the corresponding information in the empty field at the bottom and press **OK**. Example: if you want to add boxes by box number, check the Box number option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

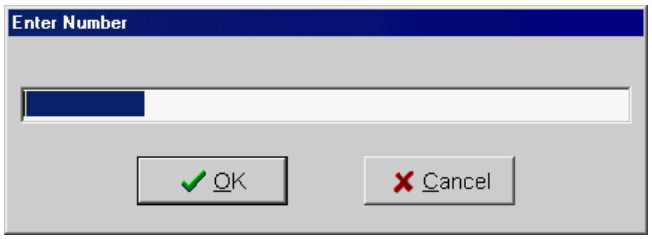
- To add items from a text file, click on **Edit->Add from text file**. A window appears.



According to the record series that is added, check off the related options. Example: if you want to add boxes by box number, check the Box number option.

Enter a text file name or scroll the directories to find the right text file and press **OK**.

- To remove items, click on **Edit->Remove Items**. A window appears.



Enter a number to indicate where to start in the selection list and click on the **Accept** button. The list of

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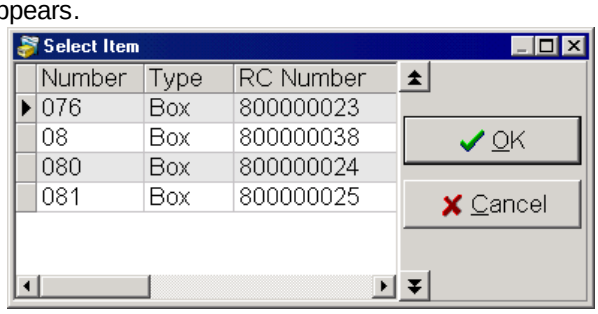
items appears.



Select the desired items (they will appear highlighted) and press **OK**. The selected items are automatically removed from the deletion list and their state becomes OUT.

- To add or edit notes, click on **Edit->Notes**. A text window opens on the screen.

Enter the desired notes or modify the existing notes and press **OK**.

7. The list can then be printed for verification by clicking on **File->Print Report->For a customer**. Its status will become LOCKED.

9.5.12.4 Editing or deleting a deletion list

In order to be edited or deleted, the status of a deletion list must be CREATED or AUTHORIZED.

1. Open the **Inventory->Deletion List** module.
2. Navigate to the desired list.

To edit a list in the CREATED state:

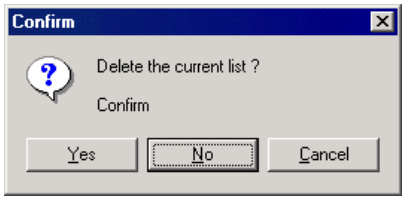
- Select the operation from the Edit menu, as described in the previous 566 section.

To edit a list in the LOCKED or AUTHORIZED state:

- To remove items select **Edit->Remove Authorized Items** then enter your password.
- Select the items to be removed and click **OK**.
- To edit notes select **Edit->Notes**
- For more extensive edits of an AUTHORIZED list, delete it and create a new one.

To delete a list:

- Click on **File->Delete List**. A dialog box appears.



- Click on the **Yes** button to confirm the deletion.

9.5.12.5 Deleting documents from inventory

Deletions lists submitted by authorized users online are automatically verified and deleted. Lists created at the record center should be reviewed and authorized prior to deletion.

1 Click on **Inventory**->**Deletion List** from the Main window.

2 Create a deletion list (see "Creating a deletion list 566 ") and print the list of documents for verification by clicking on **File**->**Print Report**->**For a customer**. The status of the list may then be

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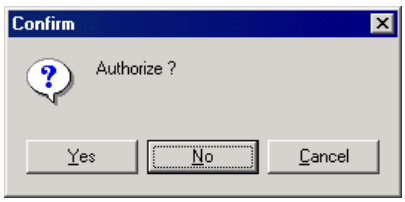
LOCKED.

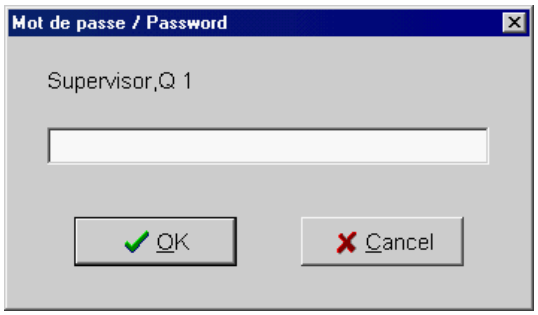
3 Click on **File**->**Processing**->**Authorize**. A dialog box appears.



Note : The authorization notion refers here to an internal approval. In fact, it means that the list has been verified, but it does not mean that a signed authorization has been sent by the customer.

4 Click on the **Yes** button. The status of the list becomes AUTHORIZED and the items can be processed.

5 Click on the **File**->**Processing**->**Destroy List**. A window appears.



Note : This window indicates the name of the user logged in.

6 Enter a password and press **OK**. The system automatically deletes the list and its status changes to DELETED. The state of documents also changes to DELETED. A delivery is automatically produced by the system, indicating the volume in storage that is canceled and must not be charged anymore. This delivery is viewable in the Delivery Verification module.

Note : When a deletion list only includes files, no delivery is created, since no storage location is emptied. A message is displayed consequently.

9.5.12.6 Viewing the items on a deletion list

1 Click on **Inventory**->**Deletion List** from the Main window.
2 Find the desired list and keep it on the screen.
3 Click on **View**->**Items**. A window containing all the items on the list will automatically be displayed.

9.5.12.7 Viewing notes on a deletion list

1 Click on **Inventory**->**Deletion List** from the Main window.
2 Find the desired list and keep it on the screen.
3 Click on **View**->**Notes**. The notes will be automatically displayed. If the list contains no notes, an information message will appear.

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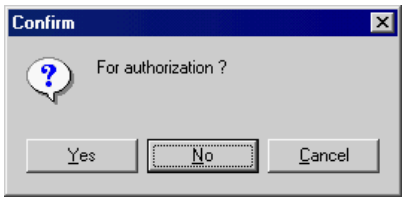
9.5.12.8 Viewing or printing documents to be removed from the inventory

1 Click on **Inventory**->**Deletion List** from the Main window.
2 Find the desired list and keep it on the screen.
3 Click on **File**->**View Report**|**Print Report**->**For customer**. A dialog box appears when the list is created.



4 Click on the **Yes** button if the report must be produced for authorization. The system automatically displays the report's window or prints the list from the default printer.

Note : Whether you are producing a report for authorization or not, both will have the same display. None of them will contain boxes to check off or spaces for signatures, since the deletion lists do not have to be approved by the customer. The only difference is that when printing an authorization report, the status of the deletion list becomes LOCKED and it allows to go on the next step of the process.

9.5.12.9 Viewing or printing volume of boxes to be removed from the inventory

This report can help customers to evaluate the savings made when deleting documents, since the related storage fees will not be charged anymore.

1. Open the **Inventory->Deletion List** module.
2. Navigate to the desired list.
3. Select **File->View Volume|Print Volume**. The report is printed or displayed.

Note : This report takes into account boxes but ignores files.
For customers that are billed by department, the report will be divided accordingly.

9.5.13 Internal Transfer List

9.5.13.1 Overview (Internal Transfer List)

This module is used in systematically moving many boxes within the record center to others areas or buildings of the same record center.

Available reports

- For picking (Items to be picked)
- For refile (Items that have been picked and are awaiting refile)
- Successful moves (Includes rejection reason if unsuccessful)

Fields[572] **(see the next section)**

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Tasks

- Manually creating a list of documents to transfer in-house 573
- Auto-creating a list of documents to transfer in-house 575
- Transferring documents from a location to another 577
- Moving without verification 578

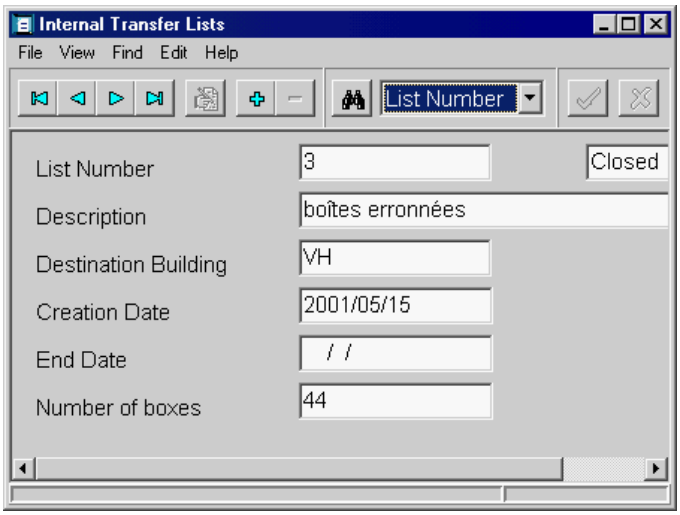
Distinctive menu options:

File menu
- Create list 577
- Auto Create 573
- Processing 577
- Close list 577
- Delete list
- Move without verification 578
- Upload move list 577

View menu
- Items (displays boxes on list)

Edit menu
- Edit 573
- Add items 573
- Add from list 573
- Add from text file 573
- Remove items 573

Module window



9.5.13.2 Fields (Internal Transfer List)

List Number

Number attributed to the list by the system and that identifies the list.

Status

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Indicates at which step of the process the list is at.

CREATED : the list is being created. It can be edited for modifications or deleted;
IN TRANSIT : the items on the list have been picked and are waiting to be refiled in another location. The list cannot be deleted or modified;
CLOSED : the items on the list have been moved and verified; the transfer process is considered as complete.

Description
Summary description of the current list.

Destination Building
This field indicates the destination building of the items. This building is chosen when the list is created.

Creation Date
Indicates when the list was entered in the system.

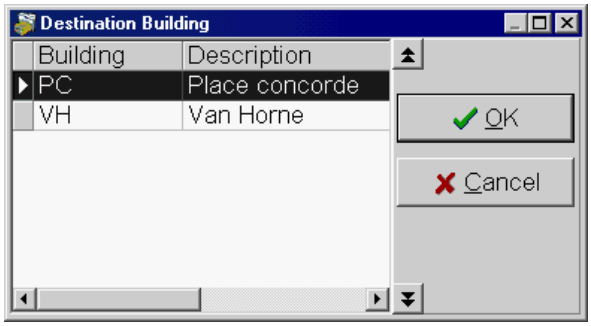
End Date
Indicates when the list was closed. The closing corresponds to the final treatment of the items included on the list.

Number of boxes
Indicates how many boxes are included on the list.

9.5.13.3 Manually creating a list of documents to transfer in-house

The major advantage of this operation is that boxes from different customers can be transferred in one operation.

1 Click on **Inventory**->**Internal Transfer List** from the Main window.
2 Click on **File**->**Create List**. A window appears.



Note : Boxes can either be transferred to a new location within the same building or to another building of the record center.

3 Select a building and press **OK**. The system automatically generates a new list whose number follows the number of the last list created. The code of the building previously selected appears in the Destination Building field.
4 Enter a summary description for the list in the Description field and click on the **Accept** button.
5 Items can now be added or removed from the list :

- To add items, click on **Edit**->**Add Items**. A window appears and asks to choose one of the

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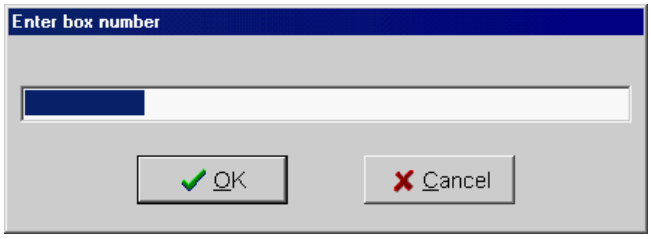
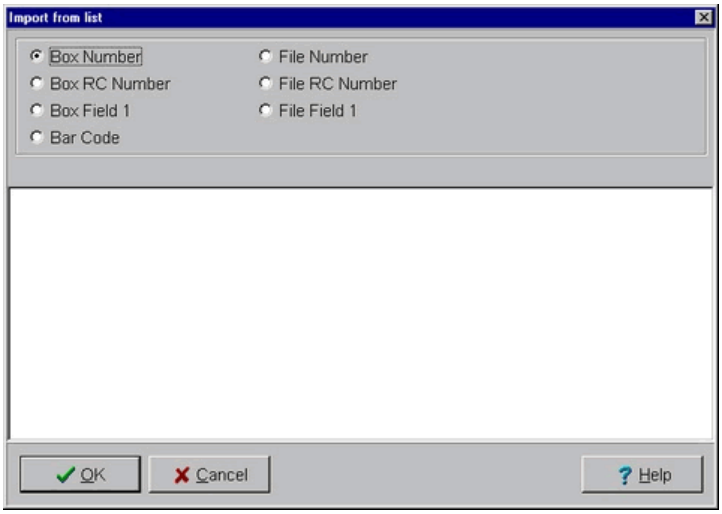
transit locations of the source building. Choose a location (this is where the boxes will be stored before being transferred to their new location). Another window opens and asks to enter a customer code. Enter the code of the customer in question and press **OK**. A third window appears.



Enter a box number and press **OK**. Proceed as many times as desired and click on the **Cancel** button to end the addition of boxes for this customer. In order to add boxes for other customers, repeat the operation by choosing another customer in the first window.

Note : Only IN documents can be added on an internal transfer list. Their state does not change, but their history and location are modified. In the Boxes module, the Location field will indicate the transit location of the building previously selected. Furthermore, new information appears in the history, to indicate that the item is on an internal transfer list and to keep track of its original location.

- To add items from a list, click on **Edit**->**Add from list**. A window appears and asks to choose one of the transit locations of the source building. Choose a location (this is where the boxes will be stored before being transferred to their new location). Another window opens and asks to enter a customer code. Enter the code of the customer in question and press **OK**. A third window appears.



Check off the related option and write the corresponding information in the empty field at the bottom and press **OK**. Example: if you want to add boxes by box number, check the Box number option and add all the box numbers in the list at the bottom.

The software will automatically add the item(s). If the software does not find the information an error message will appear.

- To add items from a text file, click on **Edit**->**Add from text file**. A window appears and asks to choose one of the transit locations of the source building. Choose a location (this is where the boxes will be stored before being transferred to their new location). Another window opens and asks to enter a

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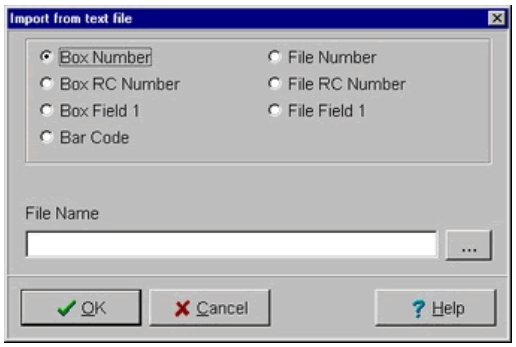
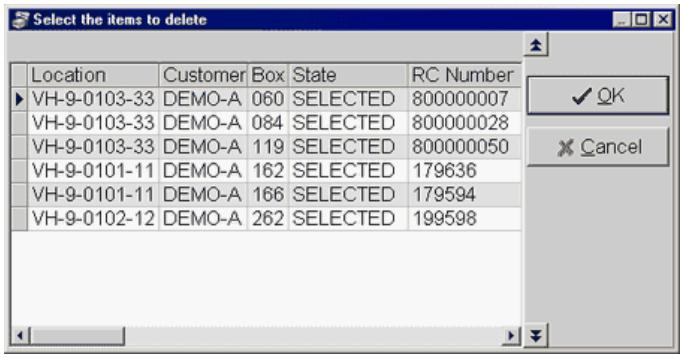
customer code. Enter the code of the customer in question and press **OK**. A third window appears.



According to the record series that is added, check off the related options. Example: if you want to add boxes by box number, check the Box number option.

Enter a text file name or scroll the directories to find the right text file and press **OK**.

- To remove items, click on **Edit**->**Remove Items**. A window appears.


Select the items to delete
Location Customer Box State RC Number
VH-9-0103-33 DEMO-A 060 SELECTED 800000007
VH-9-0103-33 DEMO-A 084 SELECTED 800000028
VH-9-0103-33 DEMO-A 119 SELECTED 800000050
VH-9-0101-11 DEMO-A 162 SELECTED 179636
VH-9-0101-11 DEMO-A 166 SELECTED 179594
VH-9-0102-12 DEMO-A 262 SELECTED 199598
OK
Cancel

Select the desired items (they will appear highlighted) and press **OK**.

9.5.13.4 Auto-creating a list of documents to transfer in-house

The auto-creation allows to transfer many boxes for many customers in one operation, and also allows to batch add boxes that are stored in the same location range. This procedure is faster than the manual creation and can be very useful when an entire section of a building has to be transferred.

1 Click on **Inventory**->**Internal Transfer List** from the Main window.
2 Click on **File**->**Auto Create**. A window appears.

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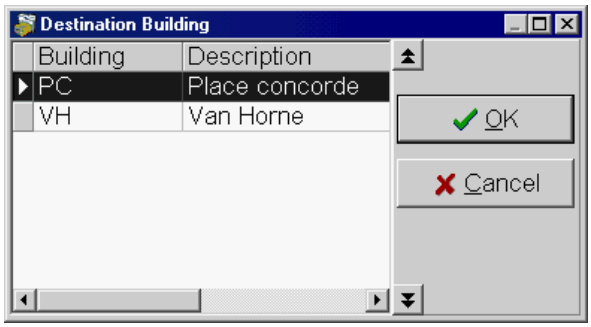
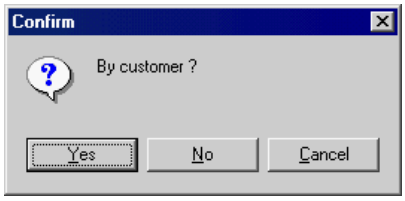


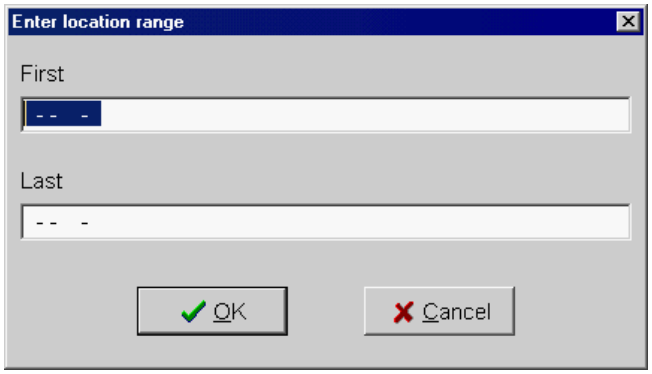
3 Select a building and press **OK**. A dialog box appears.



4 Click on the **Yes** button or on the **No** button, respectively to create a list for one customer and a range of locations or for all the boxes stored in a range of locations, no matter what customer they belong to.

5 According to the option previously selected, different windows appear.

- When the list is created for one customer a window appears and asks to enter a customer code. Enter the code of the desired customer and press **OK**. A new window opens.



Enter a range of locations to be transferred and press **OK**. Another window is displayed.

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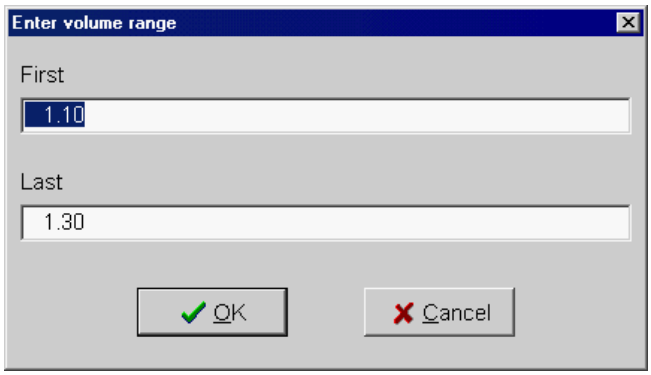


Enter a range of volume and press **OK**. All the boxes that respect the different search criteria are added to the list.

Note : The quantity of boxes added to the list is indicated in the Number of boxes field. Furthermore, the Description field will indicate "Auto-Created".

- When the list is created for all the customers, the system directly displays the window for the range of locations. Choose a range of locations and a range of volumes (see the steps described above).

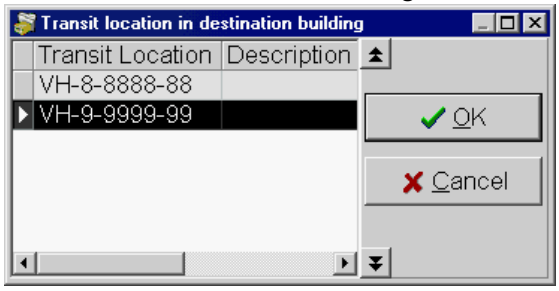
6 It is possible to manually add boxes on the list by clicking on **Edit**->**Add Items** or to remove boxes by clicking on **Edit**->**Remove Items** (see details in the previous section 573).

9.5.13.5 Transferring documents from a location to another

Once an internal transfer list has been created manually 573 or automatically 575, the boxes are then picked, verified, and refiled.

Pick and verify the boxes:

1. From the **Inventory->Internal transfer list** module opened to the correct list, click on **File->View| Print report->For picking**. This report includes the location of the boxes.
2. Retrieve the boxes to a transit location accessible with a bar code scanner.
3. From the menu, select **File->Processing->Process Items**. A window appears.



Note : When boxes are transferred from a building to another one, this window allows to choose the location of the destination building where they will be in transit before being refiled in their new location.

4. Choose a transit location and press OK. Another window opens.

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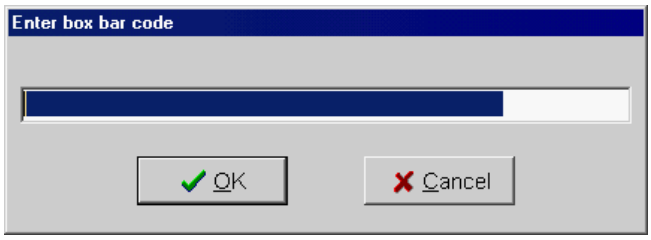


5. Scan each box, then click on the **Cancel** button when done. The list becomes "In Transit". The boxes stay IN, but information is added in the history and indicates that the boxes have been transferred to the transit location of the destination building.

6. From the menu, select **File->Processing->View | Print non-processed items**. The report should be empty. If not, retrieve and scan the missing boxes.

Note: To force all items to the processed state without the above verification, select **File->Processing->Mark all items processed**. This is not generally recommended.

Move the boxes

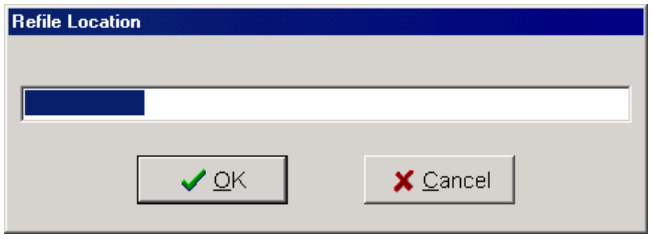
7. Move the boxes with the PDT[766], uploading the move list to **File->Upload Move List**. A message appears.

8. If any items were not processed, click on **File->Process->View | Print non-processed items**, and repeat the previous step with the missing items. The process errors report[681] may be useful. (Orders->Delivery Maintenance, File->View reports->Process errors.) (see Reconciling process errors[673]).
9. If desired, print a report of the successful moves by selecting **File->View | Print report->Successful Moves**.
10. When all transfers have been completed, click on **File->Close List**. The list becomes "Closed".

9.5.13.6 Moving without verification

This operation processes an internal transfer list without any verification by scanning. Be extremely cautious when using this. The method in the previous section[577] is preferable if boxes are actually being moved.

1. Open the **Inventory->Internal Transfer List** module.
2. Navigate to the desired list then select **File->Move without verification**. A window appears.



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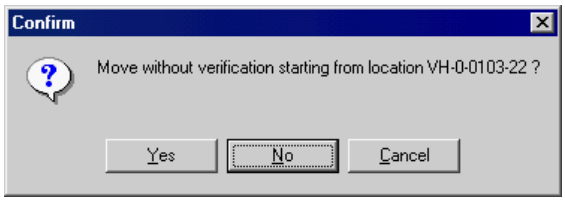
3. Scan a location or enter it manually and press **OK**. Another window appears.



4. Click on the **Yes** button to confirm the operation. The location of the items in the system is updated to this new location.

9.5.14 Internal Note

9.5.14.1 Overview (Internal Note)

In contrast to the notes fields in the Inventory->Box and Inventory->File modules, notes entered in the Internal Notes module will not be seen by the customer.

Available reports

- None. (See the Report[501] module)

Tasks

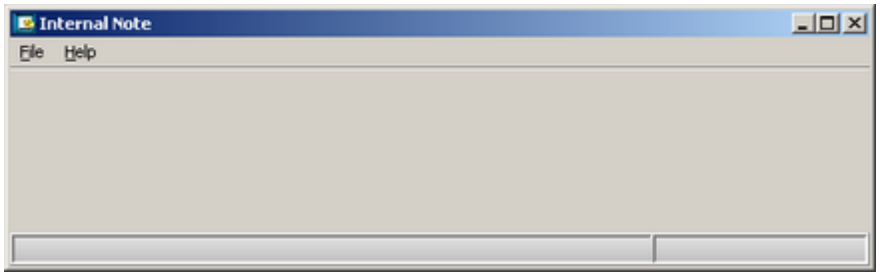
- Adding internal notes to a box | File[579]

Distinctive menu options:

File menu

- Internal notes ->Box | File[579]

Module window:



9.5.14.2 Adding or viewing internal notes

1. Open the **Inventory->Internal Note** module.
2. From the menu, select **File->Internal Notes->Boxes|Files**. A window appears.
3. Enter the code of the desired customer and press **OK**. A window appears

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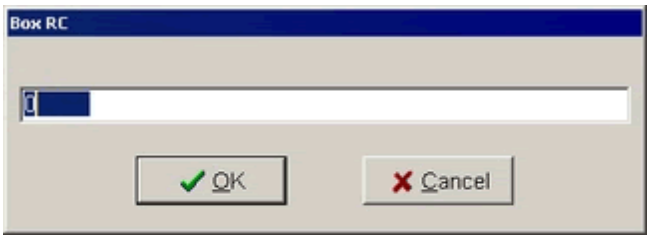
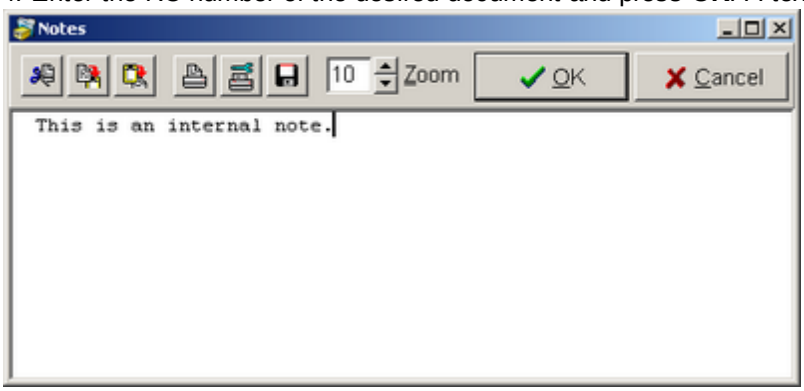


4. Enter the RC number of the desired document and press **OK**. A text window opens.



5. Edit or view the notes, then press **OK**.

9.5.15 Shredding Container

9.5.15.1 Overview (Shredding Container)

In addition to providing customers the service of destroying records[536] at the end of their retention period, many record centers also offer collection and destruction of sensitive paper waste that has not been stored at their facility.

Each bin has a unique bar code that permits you to track the activity of the bin, and for each type of bin you may assign price codes for different emptying and rotation operations.

A container emptying service consists retrieving only the contents of a container that remains at the customer site, whereas a container rotation requires the record center to provide a new container (such as a console liner) and retrieve the existing one along with its contents.

See the procedures section for detailed steps on setting up and providing this service[176].

Available reports

- None. (See the Report[501] module)

Fields[581] (see the next section)

Distinctive menu options:

File

- Auto create[582]

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- Print thermal label[582]

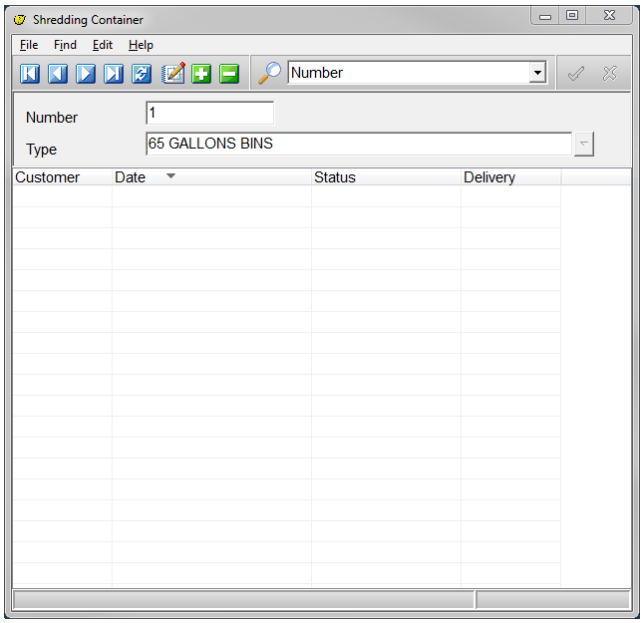
Find

- Find with bar code (Scan the bin bar code to take you to its record.)

Edit menu

- Shredding container types[582]
- ***Check Out | In container[584]

Module window:



9.5.15.2 Fields (Shredding Container)

Number

Unique identifier of the bin. This appears as the last segment of the bar code, which consists of the number 15, potentially a check-digit character, followed by the bin type number, and finally the number.

Type

The type of bin. You can define new types using Edit->Container types.

Bin history

Customer, Date, Status, Delivery

For each bin you can see the history of when it was scanned in or out, for which account, and the delivery number that it was processed on.

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9.5.15.3 Adding a shredding container

1. Click on **Inventory->Shredding Container** from the Main window.
2. From the menu, select **File->Auto Create**.
3. Select the type of container.
4. Enter the relevant information in the fields. For more information on the different fields, consult the Fields (Shredding Container)[581] topic. The description field as well as the price code fields are compulsory.
5. When all the information has been duly entered, press on the Accept button. A new type of shredding container is now available for your customers.

9.5.15.4 Deleting a shredding container

1. Click on **Inventory->Shredding Container** from the Main window.
2. Find the container you want to delete.
3. Click on **Edit ->Delete** or press on the **Delete** button.
4. Confirm the deletion by pressing **Yes**. To abort the operation press **No** or **Cancel**.

9.5.15.5 Printing a shredding container label

Note: This function permits you to reprint a label for a shredding container whose label has been damaged. If you wish to print labels for new containers, use the File->Auto Create[582] functionality to obtain new unique bar codes.

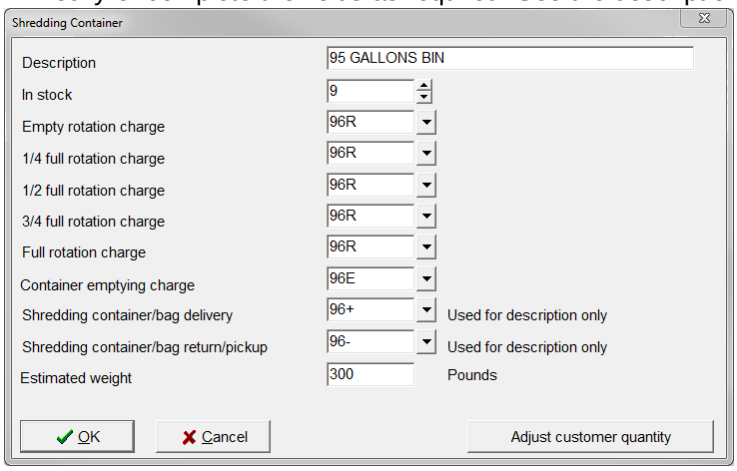
1. Click on **Inventory->Shredding Container** from the Main window.
2. Locate the container that you need to reprint the label for.
3. Click on **File -> Print Thermal Label**.

The label will be printed by the thermal printer.

9.5.15.6 Shredding container types

To modify shredding container types:
1. Open the **Inventory->Shredding Containers** module.
2. From the menu, select **Edit->Container Types**.
3. A list of containers appears, along with Edit, Add, and Delete buttons.

To Edit a shredding container type:
1. Select the bin type in step 3 above and click the **Edit** button.
2. Modify or complete the fields as required. See the description of each field below



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Description
Alphanumeric field containing a maximum of 40 characters.
This field contains the description of the container type (e.g. Blue 95 gallon bin).

In stock
Numerical field containing a maximum of 10 characters.
This field contains the number of containers in stock, i.e at your facility and available to place.

Adjust customer quantity
EDCRC keeps track of the quantity of each type of bin that each customer has.

Rotation charges (Empty rotation charge, 1/4 full, 1/2 full, 3/4 full, full)
Price 734 code to be applied when the rotated container is identified as empty using the PDT 176 or rcMobile during rotation.

Even if you charge the same amount regardless of how full the container is, it may be useful to track how full the bin was, for customer service purposes. If bins are continually full you may wish to place additional bins, while if they are routinely empty you might remove bins or decrease the frequency of service.

Container emptying charge
Price code 734 to be applied when the emptying this type of container.

Shredding container/bag delivery (Used for description only)
The description portion of this price code 734 is used to notify employees that they should pick and deliver a bag or container of this type to the customer.

Shredding container/bag return/pickup (Used for description only)
The description portion of this price code 734 is used to notify employees that they should retrieve a container of this type from the customer.

Estimated weight
This number is used to help track the weight capacity of your shredding vehicles. A full 95 gallon bin might weigh 300 lbs, while a standard archive box of paper is typically estimated to weigh roughly 25 lbs.

Adjust customer quantities
EDCRC keeps track of the quantity of bins of each type at each customer. This quantity increases whenever a bin is placed and decreases whenever a bin is scanned back to the record center on a rotation on a delivery. (A report is available in the Report 501 module 501.)

To modify this information:

1. Open the **Inventory->Shredding Container** module.
2. From the menu, select **Edit->Container types**.
3. Select the desired container type and click **Edit**.
4. Click on the **Adjust Customer Quantity** button.
5. Enter the customer key of the account that you wish to modify the count for.
6. The current count in EDCRC will be displayed. Replace this with the new value then click **Okay**.
7. If you have more accounts to adjust, then continue with the next account or bin type. Otherwise, **cancel** and **close** back to the main window.

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9.5.15.7 Check shredding container In or Out

This function helps you to adjust the history of a shredding container.

1. Open the **Inventory-Shredding Container** module.
2. From the menu, select **Edit->Check In | Out container**.
3. Type or scan the container bar code.
4. Type or scan the delivery number that the history should be attributed to.

The history of the bin will be updated to reflect the transaction. (The quantity on site is not adjusted. You may adjust this through the container type[582].)

9.5.16 Transport Container

9.5.16.1 Overview (Transport Container)

Transport containers help you to deliver files and tapes more securely and efficiently. The transport container module permits you define container types, create and label containers of each type, and review the history of a container.

Fields

- Number:
- Customer / All
- Type
- Container history grid

Tasks

- Defining a transport container type[585]

Distinctive menu options:

File menu
- Auto create
- Print thermal label

Find
- Find with bar code

Edit
- Transport container types[585]
- Check container in
- Check container out

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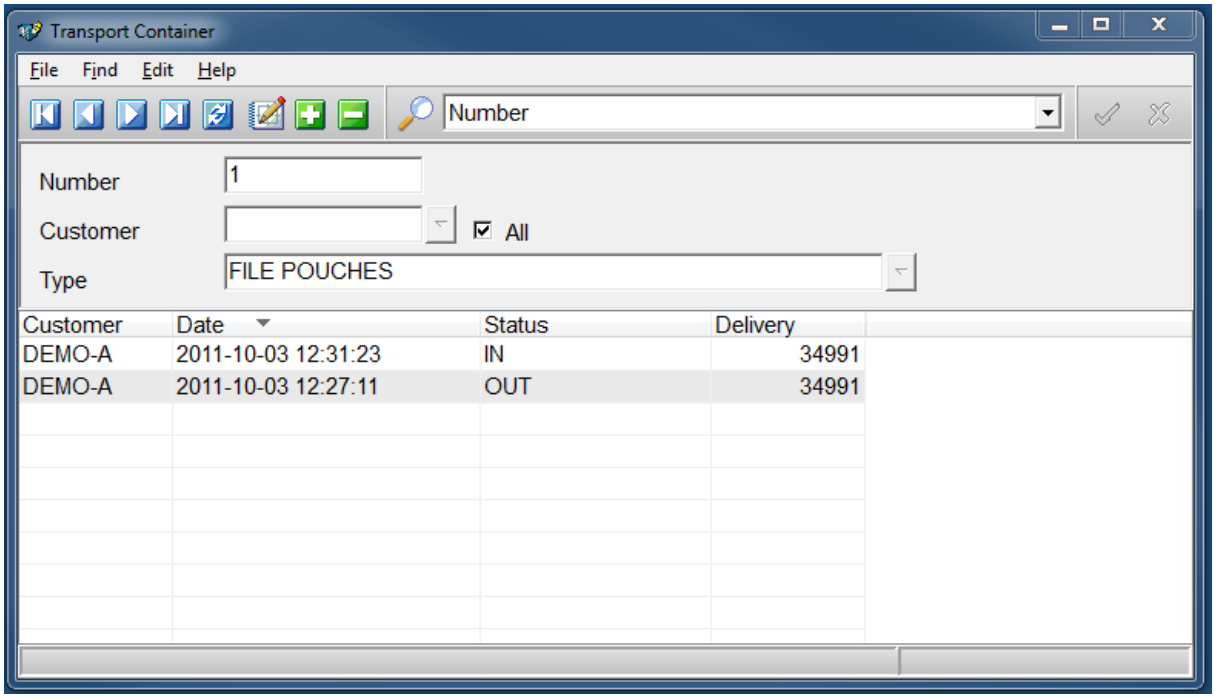
Related topics

- Packaging files and tapes with rcMobile[218]
- Validating items for delivery (Truck Validation)[174]
- Billable operations and pricing structure suggestions[74]

Module window:



9.5.16.2 Defining a transport container type

Record centers may use multiple types of transport containers, such as file delivery pouches, boxes, and tape delivery cases. For some container types, the record center may charge a rental fee if the client keeps the item overnight.

To define a transport container type:

1. Open the **Inventory->Transport Container** module.
2. From the menu, select **Edit->Transport container type**.
3. To add a container type, click on the **Add** button.

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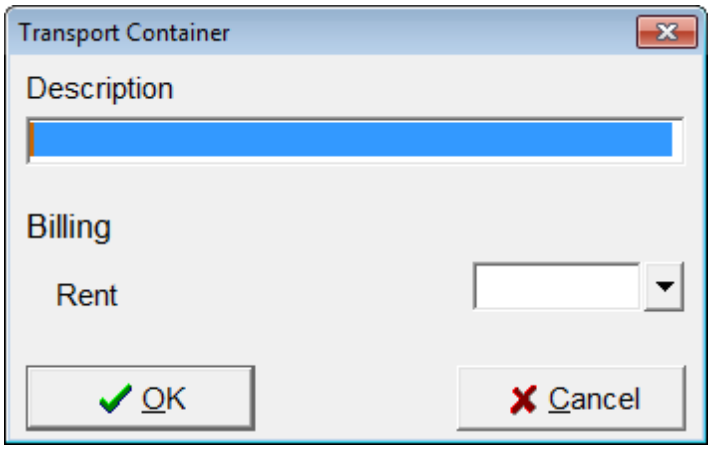

4. Enter a description, e.g. "File delivery pouch"
5. Optionally, select a price code to apply daily if the client keeps the container.
6. Click the **OK** button to finish.

9.5.16.3 Obtaining transport container bar codes

To create new transport containers and obtain bar codes for them at the same time, use the Auto create function as follows:

To auto create transport containers:

1. Open the **Inventory->Transport Container** module.
2. From the menu, select **File->Auto Create**.
3. If the transport container is for use exclusively by one account, click Yes when prompted "For customer" and select the account. Otherwise, click **No**.
4. Select the transport container type from the list that appears, and **click Okay**.
5. Enter the number of new containers to create.

The new containers will be created and their labels will be printed on the thermal label printer.

To re-print a damage transport container label:

1. In the Inventory->Transport Container module, navigate to the container that you wish to re-print.
2. Press the **F7** key, or select **File->Print Thermal Label** from the menu.

9.6 Orders (Orders tab)

9.6.1 Outline (Orders)

For efficiency and security, order processing passes systematically through distinct steps.

1. Orders are entered into the system
2. Orders items are picked
3. Items are grouped into deliveries
4. Deliveries are grouped into routes
5. Deliveries are validated
6. Deliveries are delivered
7. Deliveries are returned
8. Return items are re-filed and verified

The organization of the Orders tab reflects this process.

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Modules

- Order 588
- Picking List 620
- Delivery Creation 625
- Delivery 628
- Imaging on Demand 635
- Delivery Route 639
- Return Delivery 645
- Return Verification 658
- Non Track File) 661
- Shelf Non Track File 663
- Delivery Imaging 665
- Deleted Order Item 670
- Delivery Maintenance 672
- Recurring Orders 681

Related topic

- Working with the PDT 762 (portable data terminal)

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9.6.2 Order

9.6.2.1 Overview (Order)

This module is used to create, edit or delete an order. It is also used to consult existing orders.

Available reports

- list of orders that are not closed
- list of all orders, either by date or by customer
- picking list of items for the current order
- list of charges for the current order
- list of authorized users for the selected customer)

Fields[590] (see the next section)

Tasks

- Entering an order[591]
- Entering a purchase order[599]
- Entering a fast order[599]
- Picking and delivering an order immediately[602]
- Adding items to an order that is being created[602]
- Adding special instructions to an order[614]
- Editing an order[615]
- Deleting an order[617]
- Printing thermal labels for boxes and files[617]
- Viewing some information about the current order[618]
- Viewing or printing some reports[619]

Distinctive menu options:

File menu

- Create order[591]
- Purchase order[599]
- Terminate order[591]
- Edit order[615]
- Delete order[617]
- View picking list[618]
- Print thermal labels[617]
- View orders->Not closed | By date[619]
- Print orders->Not closed | By date[619]
- Pick and run[602]
- Fast box order[599]
- *** On site shred calendar[592]
- *** Off site shred calendar[592]

View menu

- Delivery address[618]
- Special instructions[614]
- Order charges[618]

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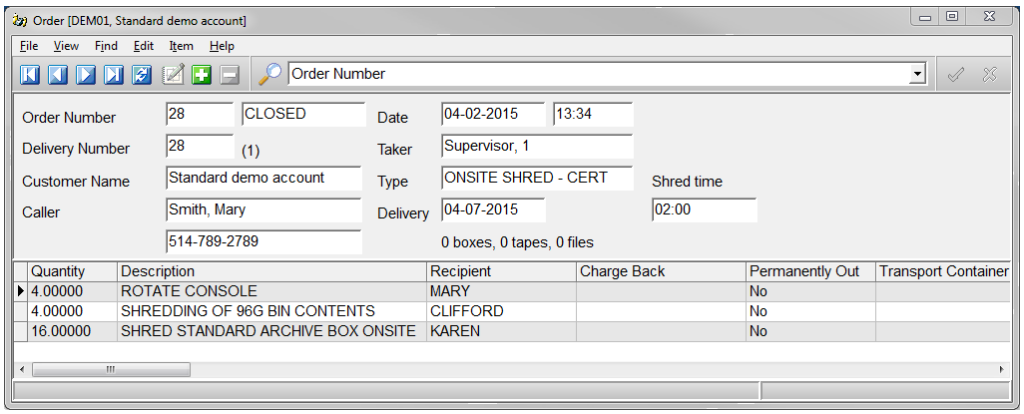
- Purchase order 618
- Authorized users 618
- Ordering notes 618

Edit menu
- Delivery address 615
- Special instructions 614
- Order charges 615
- Purchase order 615
- *** Shred/collection time 593

Item menu
- Add item 602
  - Box retrieval
  - File retrieval
  - Box sale
  - Returns/pickups
  - Line items
  - *** On site purge 593
  - *** Off site purge 593
  - Shredding container/bag rotation
  - Shredding container/bag delivery
  - Shredding container/bad return
  - Shredding container emptying
  - Box search
  - File search
  - Import from text file
  - Add to order from list
- Edit item 615
- Edit charge backs 615
- Edit recipients 616
- Edit Perm Outs 616
- Delete items 615
- View items 618

Module window:


Order [DEM01, Standard demo account]
File View Find Edit Item Help
Order Number
Order Number 28 CLOSED Date 04-02-2015 13:34
Delivery Number 28 (1) Taker Supervisor, 1
Customer Name Standard demo account Type ONSITE SHRED - CERT Shred time
Caller Smith, Mary Delivery 04-07-2015 02:00
514-789-2789
0 boxes, 0 tapes, 0 files
Quantity Description Recipient Charge Back Permanently Out Transport Container
4.00000 ROTATE CONSOLE MARY No
4.00000 SHREDDING OF 96G BIN CONTENTS CLIFFORD No
16.00000 SHRED STANDARD ARCHIVE BOX ONSITE KAREN No

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9.6.2.2 Fields (Order)

Order Number
This field indicates the order number at the record center and the status of the order. The status is indefinite when the order is being created. After having been accepted, the status will become "grouped" and "closed", according to which step of the process the order is at.

Delivery Number/Building Code
Indicates the delivery number and the code of the building associated to the order. The delivery number only appears when the order has been grouped. The building number appears in brackets to the right of the delivery number. If boxes or files are requested, the building is selected based on the location of the items. If the request is for service or sales, it is based on the service building associated to the delivery address or if absent, to the client.

Customer Name
Name of the customer (company or individual) for which the order is placed.

Caller
Indicates the customer's user who called the record center to place the order and the phone number where they can be reached.

Date
Date and time when the order was accepted.

Taker
This field can contain the name of the employee that created the order in the software. It can also mention 'Order Server' if the order was created via EDC ActiveFile Software or 'EDCWeb' if the order was created via the web interface of EDC.

Type
Method and delay for the delivery. The delays are established by the record center and determine when the items are delivered.

Delivery date
This field indicates the date and time (AM or PM) of the delivery. It will remain empty until the order is accepted.

Shred time
If this is a request for shredding service, this field displays the estimated time required for collecting and (if On Site) shredding the items. This is used for scheduling purposes.

(Count of requested boxes and files)
The number of boxes and files requested on the order is displayed.

Order item columns:

Quantity / Description / Recipient / Charge Back / Permanently Out / Transport container
The grid of the order module displays the details of each order item, including the quantity, description, (customer box number, Field 1 and the description of the box|file), name of the person to whom the item has to be delivered to. Several recipients can be present on a same order.

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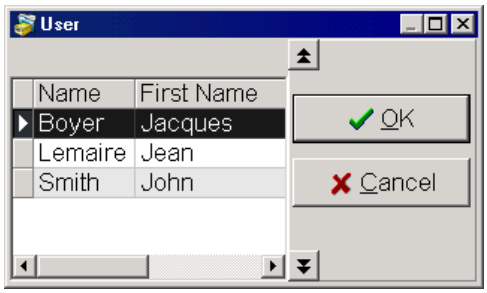
It is the charge code attached to the item. Sometimes it will be a department name. This will depend on the customer's billing parameters that are set in the Customer Information module. Several charge back (or department) can be present on a same order.

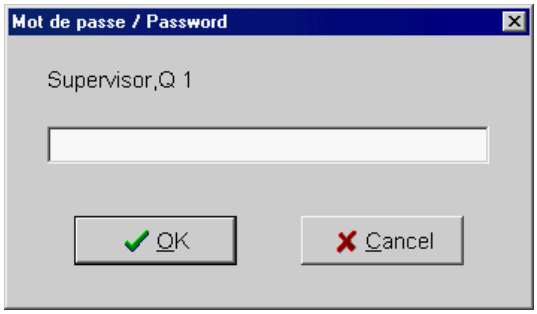
Once files or tapes have been packaged into transport containers, this information is also visible through the orders module.

9.6.2.3 Entering an order

1. Open the **Orders->Order** module
2. Click on **File->Create Order**, or press the **Insert** key. A window appears and asks for a customer code.
3. Enter the code of the desired customer and press **OK**. A window pops-up if the customer has any ordering notes, press **OK**. A window appears.



4. Select a user and press **OK**. A window opens on the screen.



Note : This window is displayed only when the user has an assigned password (settings of the Customer Information[246] and Authorized User[308] modules).

5. Enter the user's password and press **OK**. A window appears listing Delivery Addresses[332] that the authorized user has access to.

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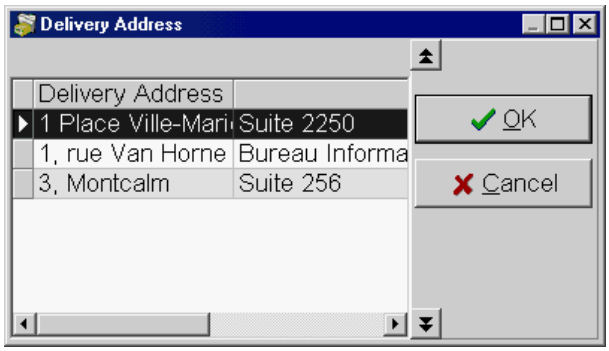
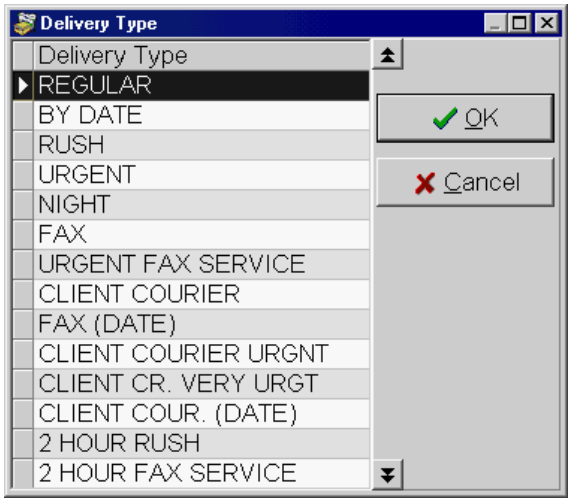


6 Select a delivery address and press **OK**. A window is displayed with delivery types[722] that the authorized user has access to.



6. Select a delivery type for the order and press **OK**.
7. Menu options for adding items to the order become available.
8. Add the desired items (see "Adding items to an order[602] " for more details)
9. Click on the **Accept** button to terminate entry for this order. This is equivalent to selecting **File->Terminate order**, or pressing **Ctrl-Enter** on the keyboard.

Note: When order entry is terminated, EDC RC assigns the order an order time and delivery date, and the items appear on the picking list for that delivery period. Terminating the order before the picking cut-off is therefore very important.

9.6.2.4 Viewing the On Site or Off Site shredding calendar

Viewing the shredding calendar

During the process of creating a shredding order, the shredding calendar is automatically displayed. If you wish to view the shredding calendar without creating an order or being able to order it, you may do so as follows:

1. Open the **Orders->Order** module.
2. From the menu, select **File->View [On Site | Off Site] shred calendar**.
3. Enter the number of weeks to display (choose a smaller number for the calendar to calculate more quickly.)
4. Press **Enter** or click **Okay**. The calendar is displayed.

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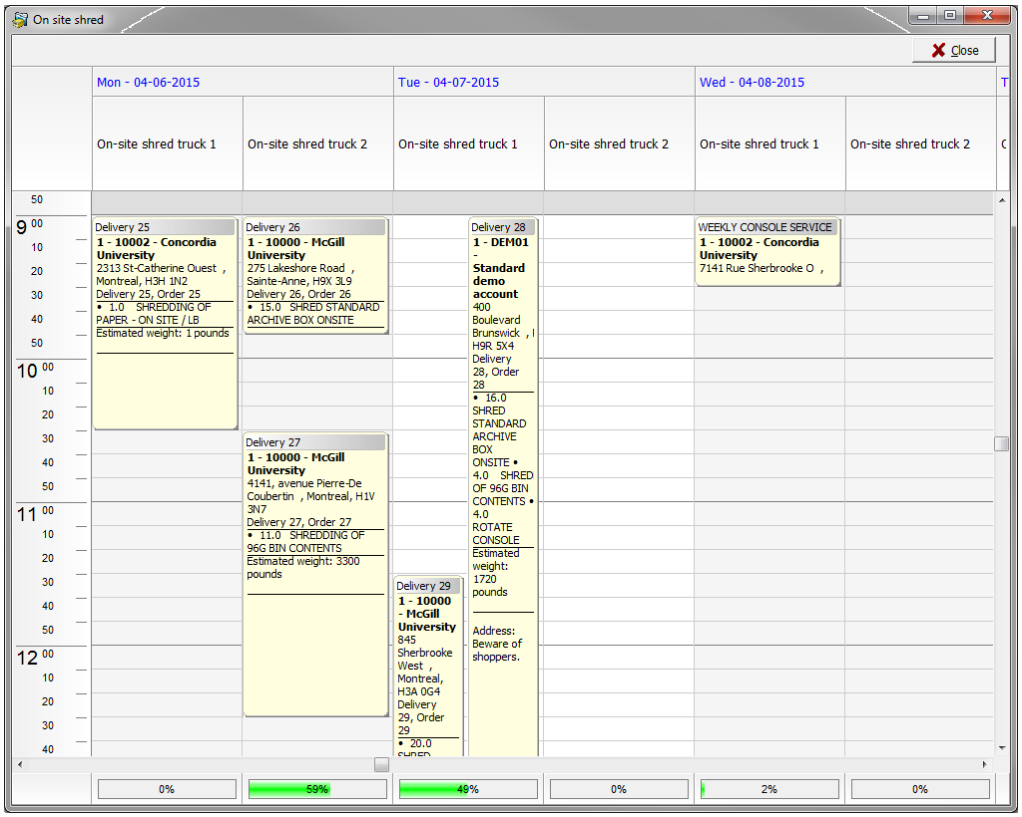
On site shred
Close
Mon - 04-06-2015
Tue - 04-07-2015
Wed - 04-08-2015
On-site shred truck 1
On-site shred truck 2
On-site shred truck 1
On-site shred truck 2
On-site shred truck 1
On-site shred truck 2
Delivery 25
1 - 10002 - Concordia University
2313 St-Catherine Ouest , Montreal, H3H 1N2
Delivery 25, Order 25
• 1.0 SHREDDING OF PAPER - ON SITE / LB
Estimated weight: 1 pounds
Delivery 26
1 - 10000 - McGill University
275 Lakeshore Road , Sainte-Anne, H9X 3L9
Delivery 26, Order 26
• 15.0 SHRED STANDARD ARCHIVE BOX ONSITE
Delivery 27
1 - 10000 - McGill University
4141, avenue Pierre-De Coubertin , Montreal, H1V 3N7
Delivery 27, Order 27
• 11.0 SHREDDING OF 96G BIN CONTENTS
Estimated weight: 3300 pounds
Delivery 28
1 - DEM01 - Standard demo account
400 Boulevard Brunswick , I H9R 5X4
Delivery 28, Order 28
• 16.0 SHRED STANDARD ARCHIVE BOX ONSITE • 4.0 SHRED OF 96G BIN CONTENTS • 4.0 ROTATE CONSOLE
Estimated weight: 1720 pounds
Address: Beware of shoppers.
Delivery 29
1 - 10000 - McGill University
845 Sherbrooke West , Montreal, H3A 0G4
Delivery 29, Order 29
WEEKLY CONSOLE SERVICE
1 - 10002 - Concordia University
7141 Rue Sherbrooke O ,
0%
59%
48%
0%
2%
0%

9.6.2.5 Processing an order for On Site or Off Site shredding

Most record centers offer confidential record destruction, either through their own vehicles and employees or through partnership with another vendor. For details on initial set-up, see Setting up your record center to offer shredding services 592.

If you wish to view the shredding calendar without placing an order, see Viewing the On Site or Off Site shredding calendar 592.

To place an order for shredding service:

1. Open the **Orders->Order** module.
2. Press the **Ins** key or the **+** button, or select **File->Create order** from the menu.
3. The dialogue to select or add an account appears. Select or add the account as follows:

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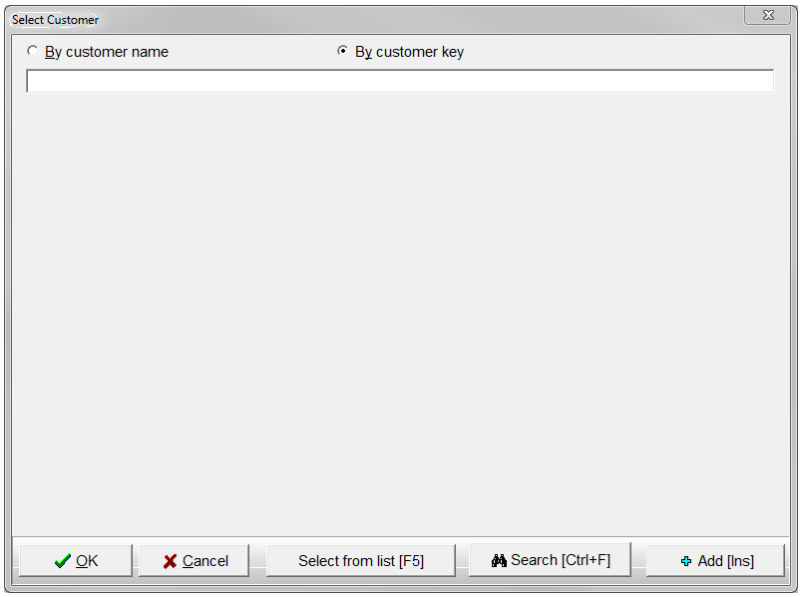
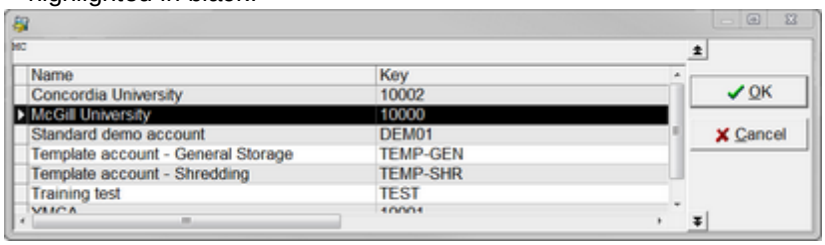


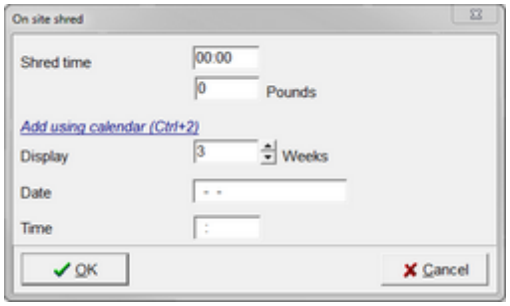
- If the account is a familiar one, select the "**by customer name**" or "**by customer key**" radio button at the top, then start typing the customer key or name.
- You can select the account from the list by pressing **F5** or pressing the **select from list** button. Start tying the customer name to position the cursor in the list, then click **Okay** once the desired account is highlighted in black.



- You can press **Ctrl+F** or click the **Search** button for a full-featured search with options including e-mail address, user name, phone number, and more. See Searching for a customer account[596] for details.
- If the account does not exist, you can add a service-only account while creating an order[597], by clicking on the **Add** button or **Ins** key and following the prompts.

4. Select the user who is calling, then click **OK**.
5. Select the delivery address then click **OK**.
6. Select the Delivery type then click **OK**.

Note: It is the selection of an On Site or Off Site Shred delivery type that identifies this as a shredding order.



7. A dialogue appears to help set up for using the shredding calendar.

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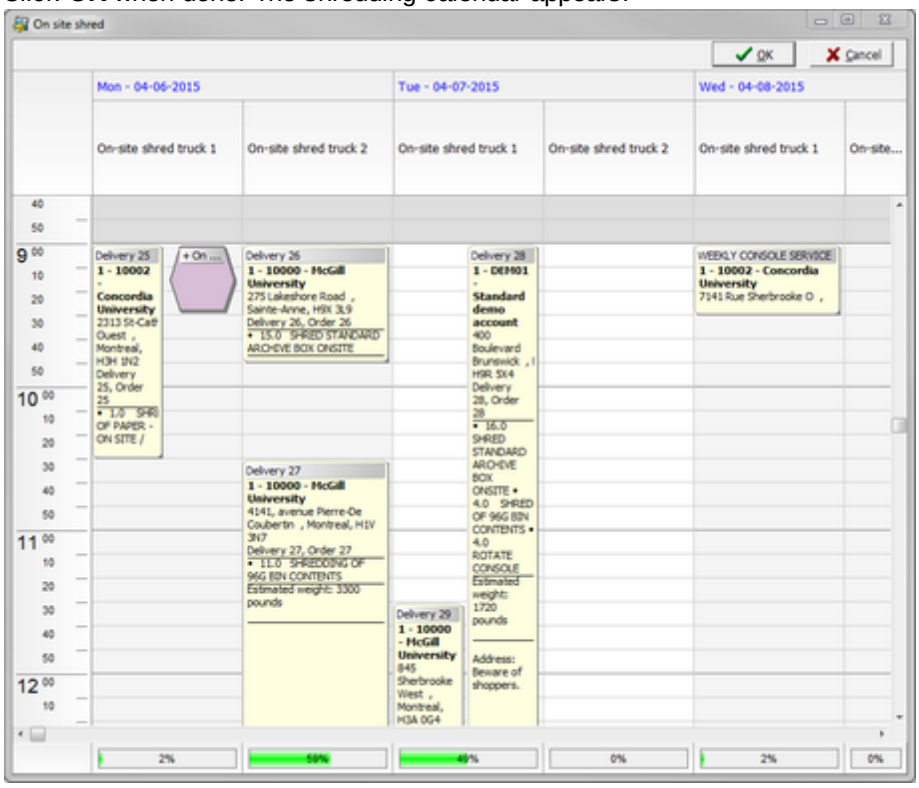
- Enter an estimate of the **time** required for collecting and shredding the material. This will determine how much time gets reserved in the scheduler.
- Enter the estimated **weight (Pounds)**. This will be used in calculating the remaining weight capacity on vehicles.
- Optionally, adjust the number of weeks to display in the calendar, as well as the starting date and time to consider.

Click **OK** when done. The shredding calendar appears.



8. Your new order appears as a purple hexagon. **Click on its gray header** to get the "**Move**" mouse icon (a 4-pointed arrow pointing up and down and left and right), and **drag** the appointment to the desired date and vehicle.

Notice at the bottom of the screen that the percent capacity of the vehicle is adjusted to reflect the anticipated weight of the order.

9. Click **Okay** to accept the positioning on the shred calendar.
10. Click **Okay** on the previous dialogue that now shows the updated scheduling parameters. You are now have a blank order and can add items to it.

Add shredding items to the order

Shredding order can include shredding container rotations and emptying, as well as line items flagged as suitable for On Site or Off Site shred through the **Accounting->General Pricing** module where price codes are set up. You cannot include services such as box or file delivery on this type of order.

11. From the menu, select **Item->Add** Item.

To add a purge item:

- Press **Shift+F5** or select the corresponding menu option.
- **Select the item** from the list of purge items available at your record center.

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- Adjust the quantity and recipient if necessary, and click **OK**. The item is added to your order.

To add a container emptying, rotation, delivery, or removal:
- Select the item from the menu or press the corresponding keyboard shortcut.
- Select the shredding container type from the list available to this account.
- Adjust the quantity and recipient if necessary, then click **OK** to add the item to the order.

Confirm the order

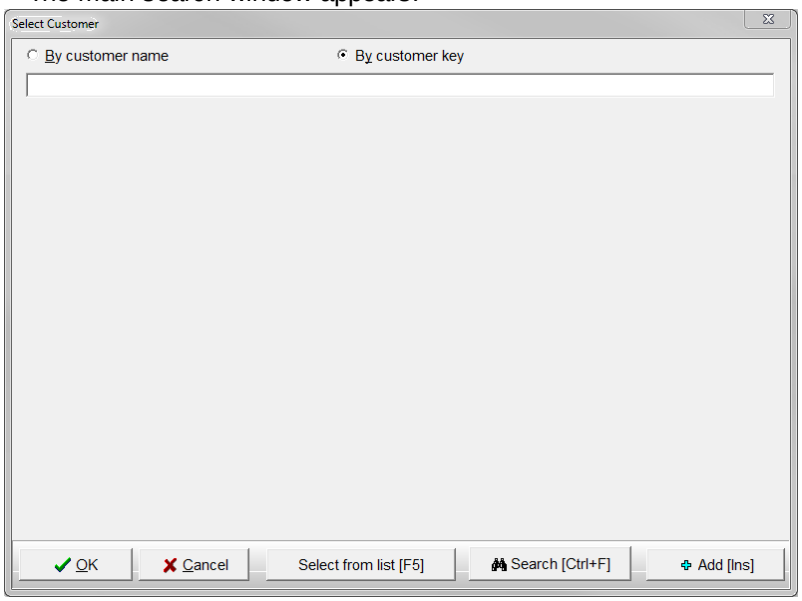
12. When you are done adding items to the order, press **Ctrl-Enter**, or click the green check mark to accept.

Your order has now been placed. It is ready for route management. A delivery number is assigned and the status of the order is *Closed*. Your delivery will appear as *On truck*. If you are performing container rotations then your drivers will receive a summary picking list of the items that they need in order to perform their services for the day.
***

9.6.2.6 Searching for a customer account

The following search functionality is available in several place including through the **Customer->Customer Information** module and through the **Orders->Order** module while selecting an account to place an order.

- The main search window appears:



- To search by various field including e-mail addresses, user names, or phone number, press **Ctrl-F** or click the **Search** button from the customer selection window. Enter partial or complete information in one or more of the fields, then click **Search** to execute a full-text search.

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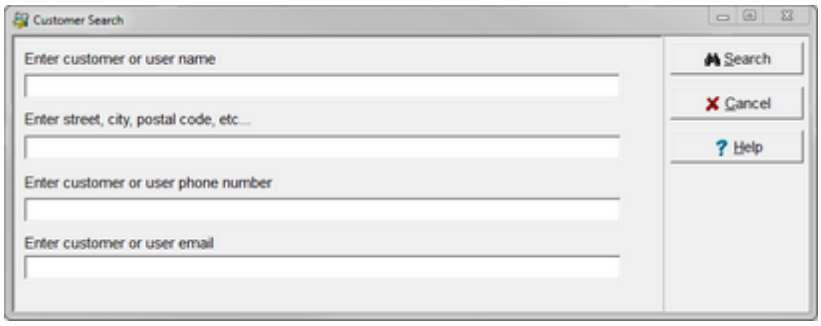
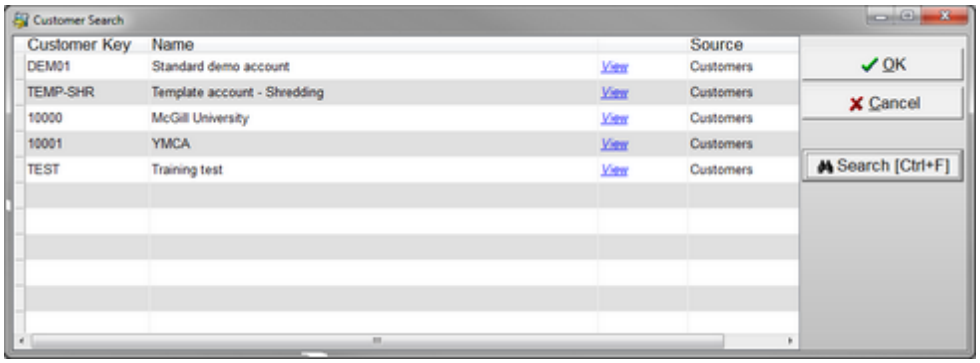


From the results list, you can see which accounts matched and where, you can click on view to see more details about an account.



If you find the desired account then select it and click **OK** to proceed.

You can further refine your search by clicking on the **Search** button (**Ctrl+F**) and adding more criteria to the search and repeating.

9.6.2.7 Adding a service-only account while creating an order

While records management accounts require fairly involved set-up and contracts surrounding the storage of their items and who can access them, much less information is required to service new accounts that simply wish to purchase material from you or use your purge shredding services.

If you require details on setting up for the first time, see Setting up your record center to offer shredding services 92,

Once your service-only template account has been configured, you set up new service-only accounts while placing an order as follows: (Note that you can easily turn these into standard accounts if you later sell them additional services.)

Setting up a service account while placing an order:

1. You have already started creating an order 593 and have searched 596 to determine that the account does not already exist.

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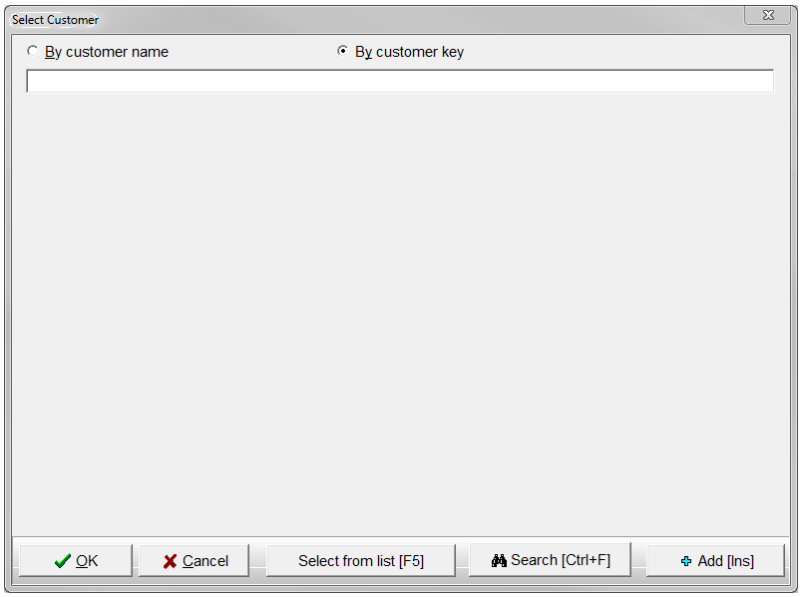
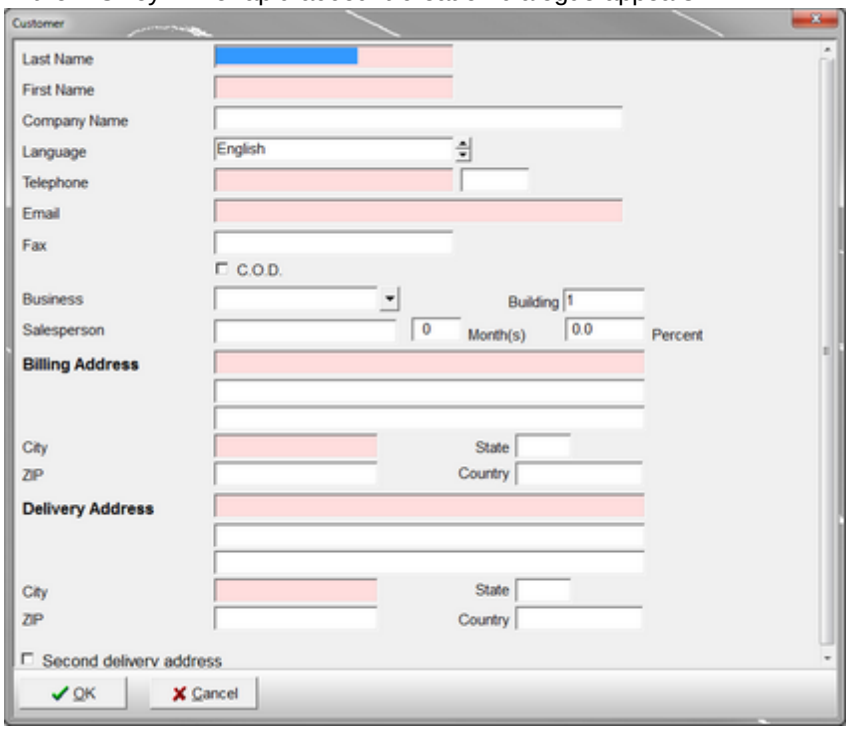


2. From the customer search window, click the **Add** button at the bottom right of the window or press the **Ins** key . The rapid account creation dialogue appears.



3. Fill in the form. Values in Pink are mandatory while values in white are optional. The billing address will automatically fill in as the first delivery address, unless you type over it.

Fields:

- **COD:** When this is selected, the driver will require payment on delivery, which they can collect with the help of rcMobile.
- **Building:** This is the service building that delivery the vehicle would leave from when providing the service.
- **Salesperson / Months / Percent:** These fields are used in calculating the commissions owed to your salesperson responsible for the account.

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- **Delivery Address:** Please ensure that the address including postal code is adequately captured. This is especially important if you are using EDCRC's automated route optimizing functionality.
- **Second delivery address:** If the account that you are setting up has multiple delivery addresses then you may check this box in to get fields to enter an additional address. This is optional and will not be used for the present order.

When you are done, click **OK** to continue placing the order with the account that you have just created. Recall that all parameters not specified will be taken from your service-only template account, established while Setting up your record center to offer shredding services 92 .

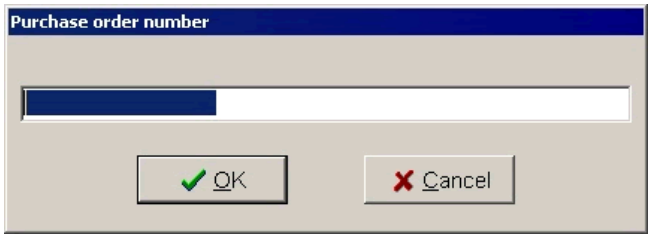
You will be prompted to confirm the addition of a new account and if you are low on available accounts, the number remaining will be displayed.

EDCRC will then continue with the order entry process, using the specified user and delivery address and prompting you for the Delivery type.

9.6.2.8 Entering a purchase order

A purchase order is solely used when a customer buys services or cardboard boxes without retrieving or searching for boxes or files.

1 Click on **Orders->Order** from the Main window.
2 Click on **File->Purchase Order**. A window appears.
3 Enter the code of the desired customer (to have the list of customers press **OK** --- select a customer and it will appear highlighted) and press **OK**. A window appears.



4 Create a number for your order. Press **OK**
5 Select a delivery address in the list (it will appear highlighted) and press **OK**.
6 Select a delivery type in the list (it will appear highlighted) and press **OK**.
7 Add the desired items (see "Adding items to an order 602 " for more details) and click on the **Accept** button to terminate the order.

Note: The purchase order only includes box sales and line items, so it is normal not to have access to the rest of the items.

9.6.2.9 Entering a fast order

A fast order is a special kind of order for which parameters have to be pre-defined in the Customer Information module (See Using the Pick and run and the Fast order options 169). Only the ordered boxes have to be selected and the recipient has to be confirmed, so that these orders can be placed easily.

1. Click on **Orders->Order** from the Main window.
2. Click on **File->Fast Box Order**. A dialog box appears.
3. Enter the desired customer key and press **OK**. A window opens.

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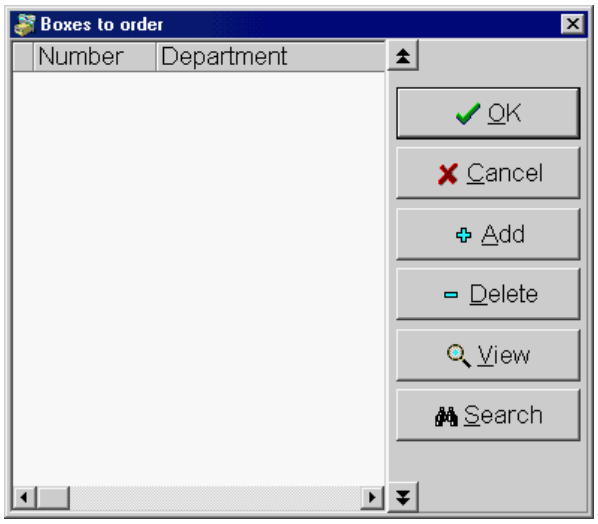
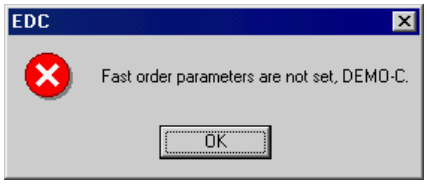


Note : If the parameters for fast orders have not been set for the customer, a message appears.



4. Press **OK**, get out of the Order module, open the Customer Information module and set the appropriate field (see the description of the fields for fast orders[248] in the Customer Information module).

5. Perform one of these operations :

- To add boxes to the order, click on the Add button. A window appears.

Enter a box number to indicate where to start in the selection list and press OK. A list of the inventoried boxes for that customer appears. Select the desired boxes and press OK. The window for box order opened in 3 reappears, and displays all the boxes selected here.

- To add items to the order by performing a search, click on the Search button. A window appears.

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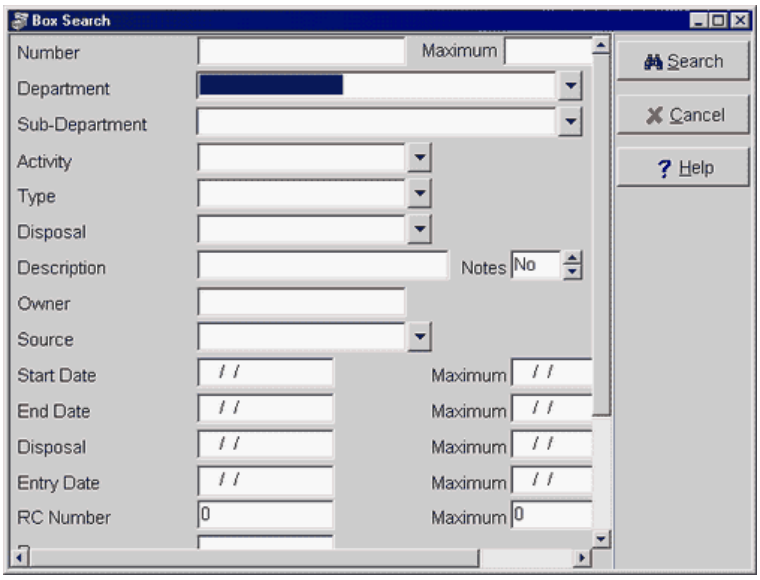
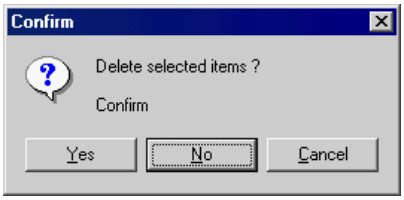


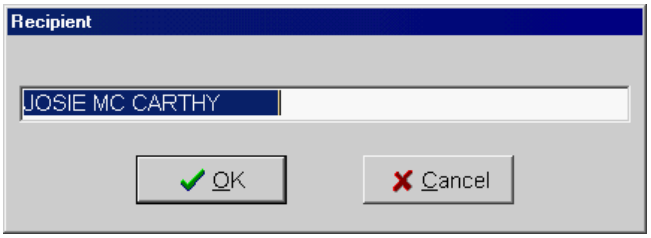
Enter the desired search criteria and click on the Search button (see "Searching for boxes and files[486] "). The system will find all the boxes that correspond to the search criteria and will automatically add them to the order if they are IN.

- To remove items, select them and click on the Delete button. A dialog box appears.



Click on the **Yes** button to confirm the deletion. The items in question will not be ordered.

Click on the **Cancel** button of the window opened in 4 to accept the order. A window appears.



6. Press **OK** to confirm that this person will receive the boxes or enter any other name. When the case arises, a report's window appears and indicates all the boxes that were rejected from the order (boxes OUT, in PRE ADD, etc).
7. After going through the list of reasons the system rejected some boxes, click on the **Close** button. A dialog box appears and asks to "prepare the portable data terminal for the data transfer".
8. Prepare the PDT[871] to receive the data and click on the **OK** button. The data are automatically transmitted and downloaded to the PDT, so that the boxes can be picked at their locations. The status of the order becomes GROUPED.

Note: The fast orders are identified by a small icon located under the Caller field.

9. After the fast order has been picked, click on **File->Upload Fast Order** in order to upload from the

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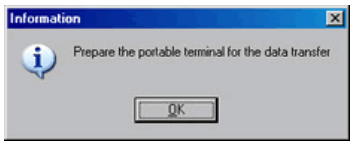
PDT the picking results. This will start the printing of two copies of the delivery slip. Or go in the Delivery Verification module and click on **File->Upload Fast Order**.

9.6.2.10 Picking and delivering an order immediately

This operation allows to pick an order individually and to deliver its items immediately by downloading them on a PDT. (See Using the Pick and run and the Fast order options 169.)

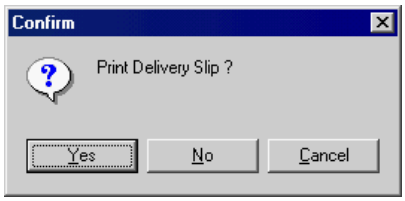
1 Click on **Orders**->**Order** from the Main window.
2 Keep the desired order on the screen and click on **File**->**Pick and Run**. A dialog box appears.



3 Prepare the PDT to receive the data and click on the **OK** button. The picking list is automatically downloaded to the PDT and a delivery is created for the order that becomes GROUPED.

Note : If a delivery has already been created for the order, the delivery must only include the current order, otherwise an error message will be displayed.

4 Proceed to the picking of the items with the PDT (see the section "Picking items with the PDT 170") and upload the picking results by clicking on **File**->**Upload Fast Order** (option also available in the Delivery Verification module). When results have been uploaded, a dialog box appears.



5 Click on the **Yes** button to print the delivery slip or click on the **No** button to do not print it. The order is automatically marked as CLOSED.

9.6.2.11 Adding items to an order

To create an order, follow the steps in the section, "Placing an order" 591. Once an order has been created, you may add one or more items to the order.

Note that your delivery type will affect what type of items can be placed on your order. For shredding service, see Processing an order for On Site or Off Site shredding 593

Adding a box retrieval

1. Click on **Item->Add Item->Box Retrieval**. A window appears.

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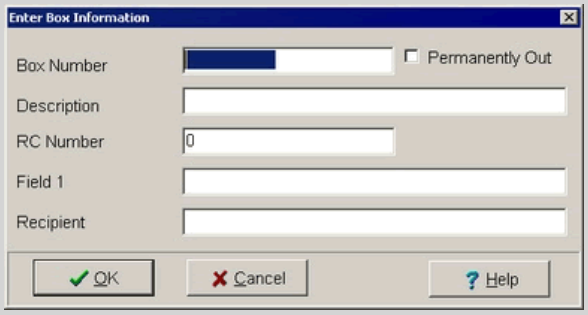
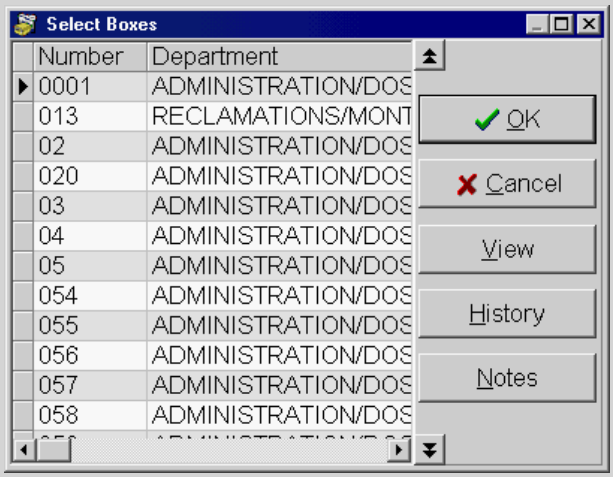


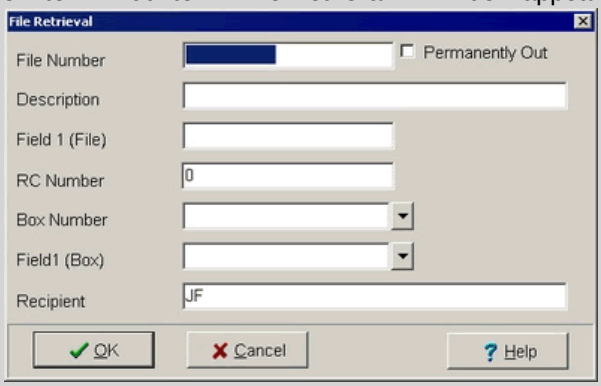
2. Enter a recipient (required). Enter value for the box number, description, RC number, or Field 1, and press **OK**. A list of boxes will appear, positioned to the specified value, sorted by the specified field.



3. Highlight the desired boxes and click on the **OK** button.

Adding a file to an order

1. Click on Item->Add Item->File Retrieval. A window appears.



2. Enter a recipient
3. Specify the file

By File RC number:

- If have the file RC number is known, enter it and click **OK** to add it to the order.

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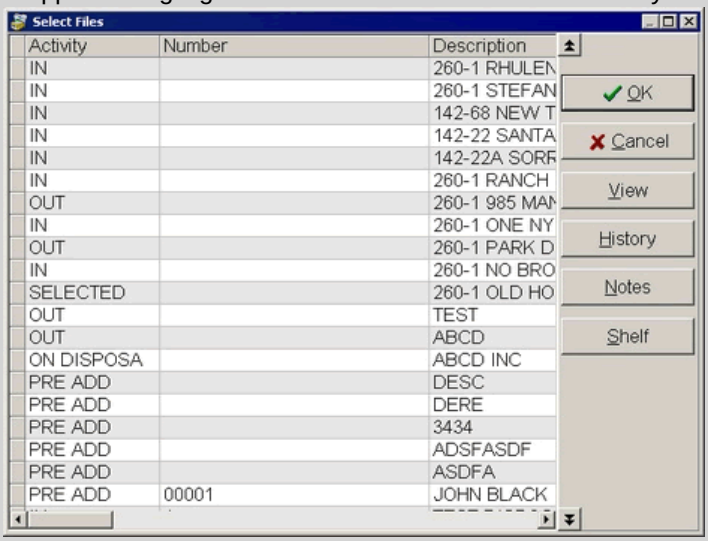
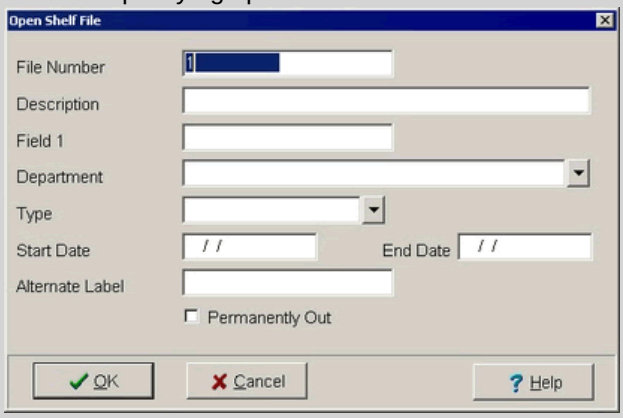
By file number or description:

- If the file number or description is know, enter that information and click **OK**. A list of inventoried files appears. Highlight one or more files and click **OK**. They will be added to the order.



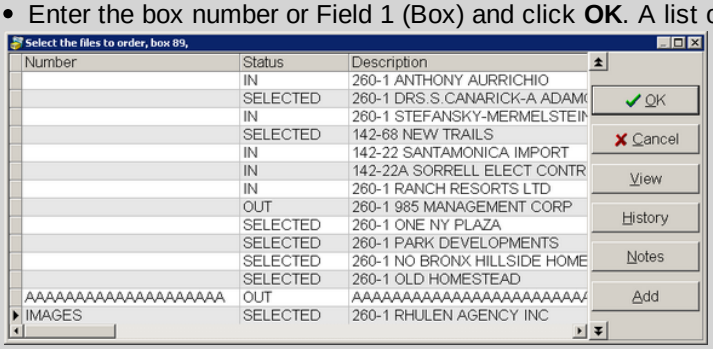
- If the file is stored open shelf and is not inventoried, click on the **Shelf** button. A window appears with criteria for specifying open shelf files.



1. Enter the desired information in the appropriate fields (one must enter at least the department and the type of the file) and press **OK**. The file is added to the order as an auto-inventoried file[866]. You are returned to the list of files, with the added file selected.
2. Click **OK** to add the file to the order.

By box:

- Enter the box number or Field 1 (Box) and click **OK**. A list of files in that box appears.



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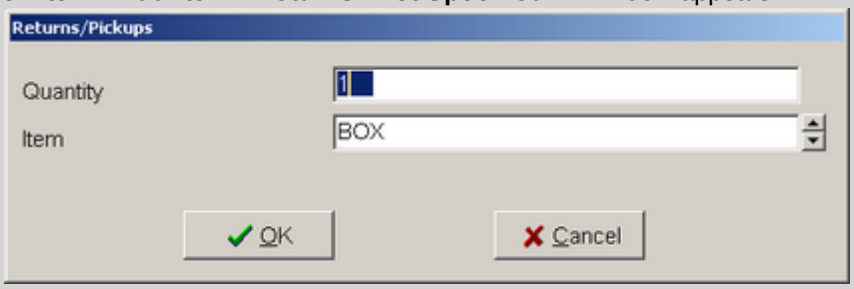
- If the file exists, highlight the file and click **OK**.
- If the file has not been inventoried but the customer wishes for you to search in the box, click the **Add** button to create an auto-inventoried file[866]. In the window that appears, enter the file number, description, and/or field 1, then click **OK**.
- You are returned to the list of files in the box, with the new file selected. Click **OK** to add the file to the order.

Note: Because several files can have the same number and description, click on the View button to open the detailed report and see the RC number, in order to be sure that the right file is ordered.

Note: Auto inventoried files in boxes can only be added to an order if the box has been specified.

Adding a quantity of return items

1. Click on **Item->Add Item->Returns->Not Specified**. A window appears.



2. Enter the quantity of return items, select whether the items are Boxes, Files, or Tapes, and press **OK**.

Note : This quantity of returning items appears on the delivery slip for reference in planning and performing the delivery. For return courier, the actual quantity billed is taken from the quantity entered or scanned on the return delivery.

*Adding a return of specific boxes or files

This option need only be used if a customer wants to ensure that specific items are picked up. It is easier to use non-specified returns.

1. Click on **Item->Add Item->Returns->Boxes|Files**. A window appears.

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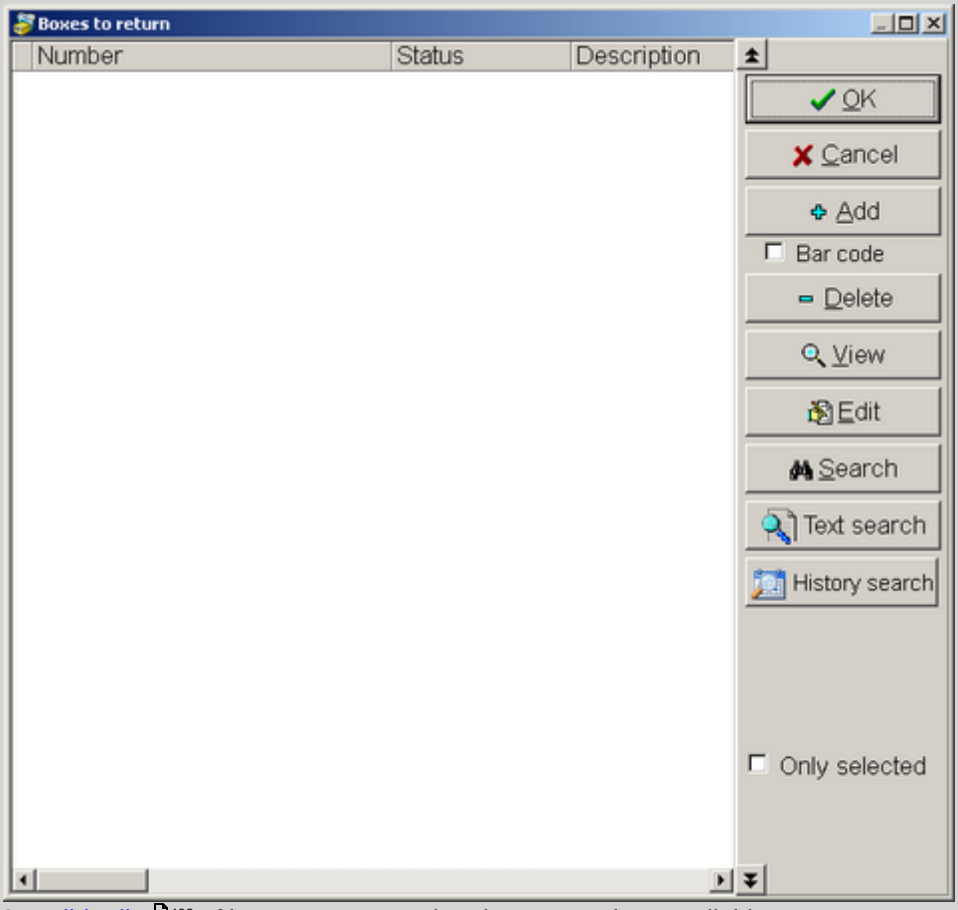
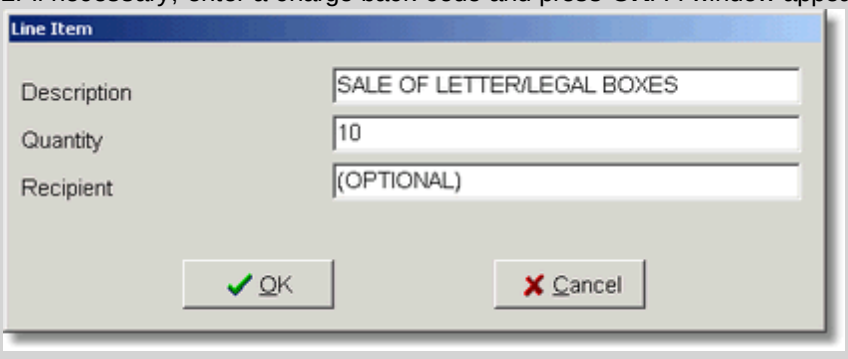


2. Build a list[492] of items to return using the may options available.
3. Press **OK** to complete the operation.

Note : Specified returns are listed on the delivery slip. If the delivery is performed with the PDT, the PDT will prompt the driver for each item to be picked up. (It is not necessary to scan boxes in the order prompted.) If items were not picked up, a report will of missing items will appear upon returning the delivery. It is still possible to mark the return as complete, but missing items will be added to the process errors report[681]. (see Reconciling process errors[673]).

Adding a cardboard box sale

1. Click on **Item->Add Item->Box Sale**. When the customer is billed by charge back a window appears.
2. If necessary, enter a charge back code and press **OK**. A window appears.



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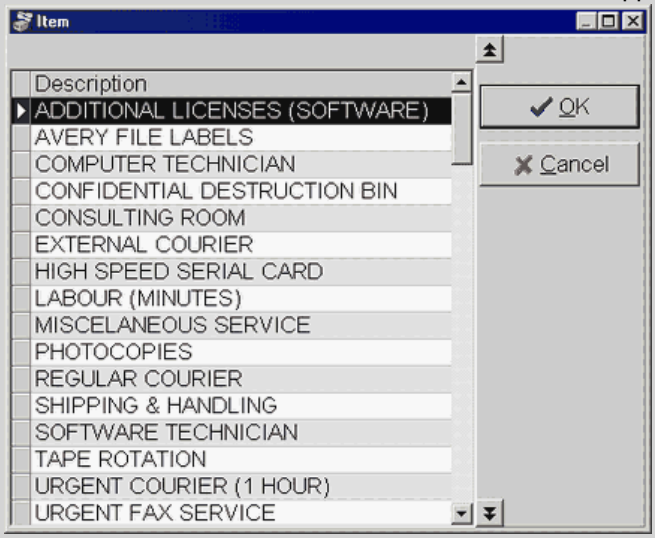
Note : The system displays by default the quantity entered in the Order Minimum field of the General Pricing module for the box sale items. No quantity of box sale less than this one can be ordered.

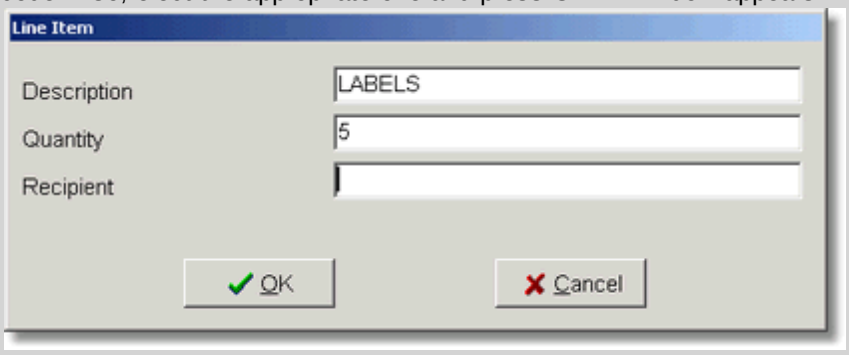
Adding products or services to an order as Line items

A record center can make any product or service available for order as a line item[739], which might or might not be billed. Common examples include bar code labels, non-standard size boxes, and various service charges. To be included on that list, the Line Item and Order Entry fields of the item in question must be set to "Yes" in the General Pricing module.

1. Click on **Item->Add Item->Line Item**. A list of line items appears.



2. Highlight an item and press **OK**.
3. Depending on the customer billing options, you may be prompted to select a department or charge back code. If so, elect the appropriate one and press **OK**. A window appears.



4. Enter the desired quantity, and optionally the recipient, and press **OK**.

Adding shredding-related services to an order

Four shredding-related order options exist.

Operation	Containers	
	To customer	From customer
Shredding container rotation	1	1
Shredding container delivery	1	0

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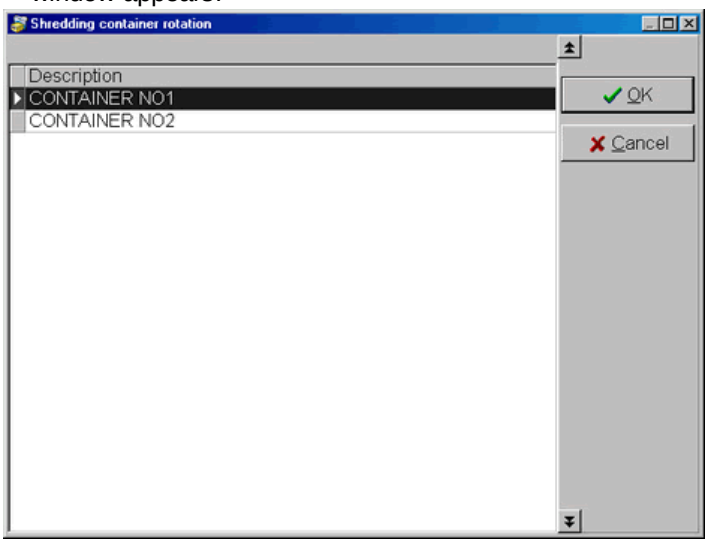
Shredding container return	0	1
Shredding container emptying	0	0

To add one of these services to an order:

1. Click on **Item->Add Item->Shredding container/bag rotation | delivery | pick up | emptying.** A window appears.



2. Highlight the type of container to be processed, then press **OK**.
3. The item will be added to the order.

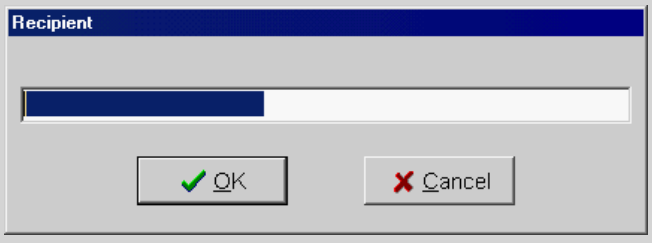
Note: The container type must be made available to the customer[130] before it can be ordered. Shredding container delivery and return order items can be placed through EDC RC but not over the web, since they are typically associated with contract modifications.

[****]

Adding a box from a search

You may also create a list of boxes or files to order using The box and file searches behave as the , contrary to a simple search, adds items to the order.

1 Click on Item->Add Item->Box Search. A window appears.



2 Enter the recipient and press OK. When the customer is billed by charge back a window appears.

3 When necessary, enter a charge back code and press OK. A window appears.

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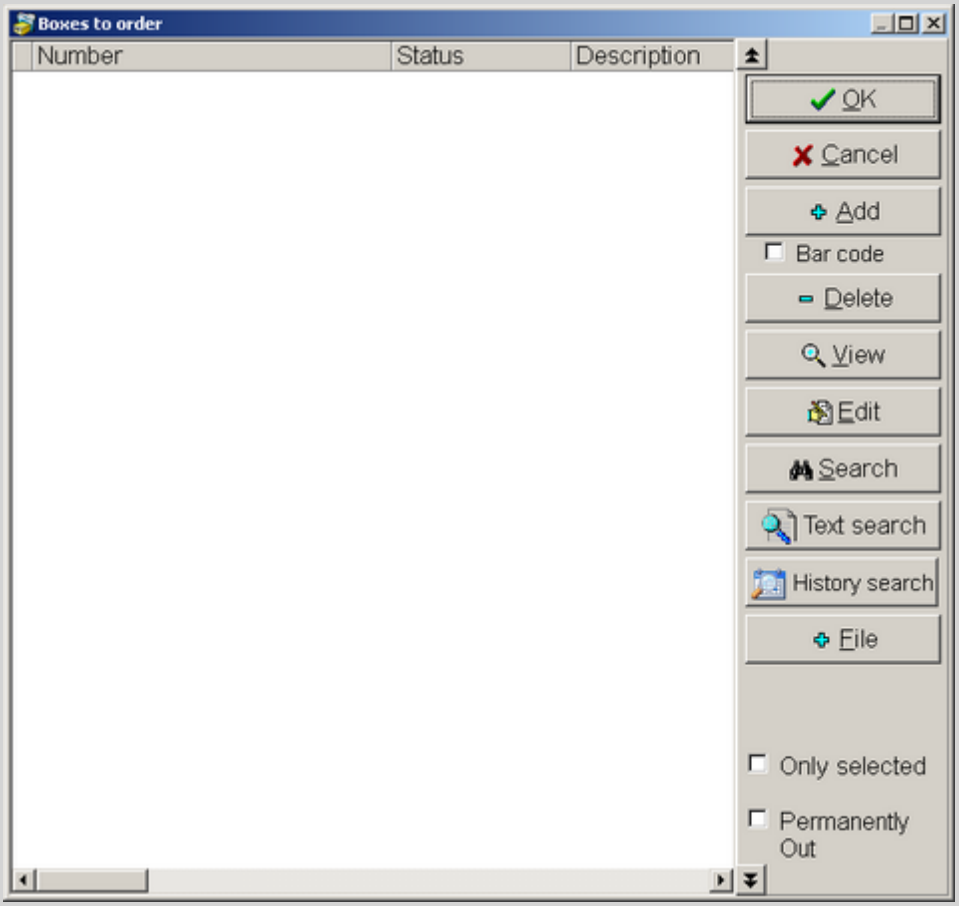

4 Perform one of the following operations :

- To manually add boxes, click on the Add button and enter a number in the window that is displayed. The list of the boxes or files for the customer appears. Select the desired items and press OK. The items are added to the selection and are displayed in the window opened in 3.
- To edit the information of a record, select a record (it will appear highlighted) and click on the Edit button.

Note : By selecting a box in the ones that are added to the order and by clicking on the File button, it is possible to enter a description for a file contained in that box; this will indicate to the system not to order the entire box but only the file.

- To add items by performing a search, click on the Search button. A window appears.

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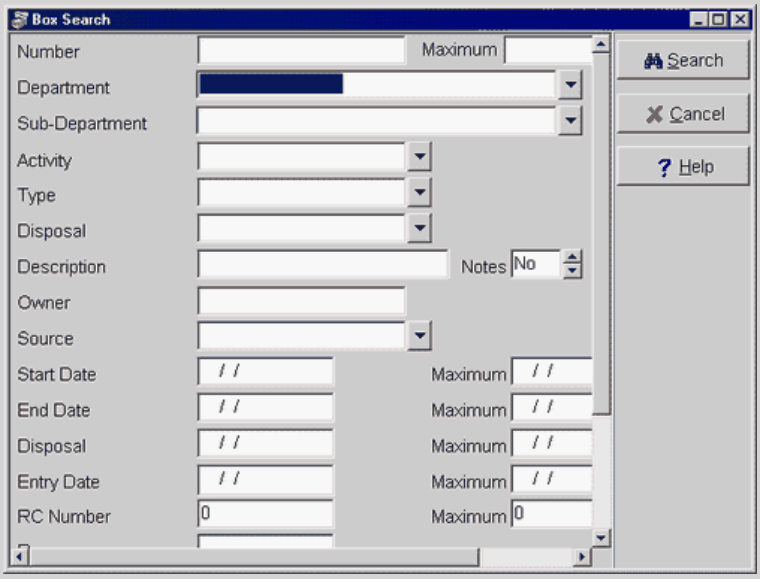


Enter one or more search criteria and click on the Search button. All the boxes that correspond to the entered criteria are automatically added to the selection. They will appear in the window opened in 3.

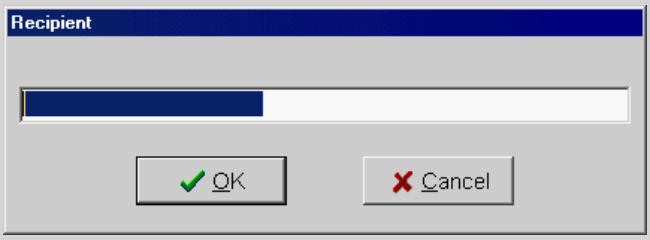
- To remove an item from the selection, select it and click on the Delete button.
- To include only certain boxes from the list: select the boxes and files you want to add and check the field called "Only Selected".
- If the boxes are to be permanently removed from storage, check the field called "Permanently Out".

5 Click on the Accept button to confirm the addition of all the items to the order. The available boxes and files are added to the order and a message appears for each rejected item, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.).

***Adding a file from a search**

The file search, contrary to a simple search, adds items to the order.

1 Click on Item->Add Item->File Search. A window appears.



2 Enter the recipient and press OK. When the customer is billed by charge back a window appears.

3 When necessary, enter a charge back code and press OK. A window appears.

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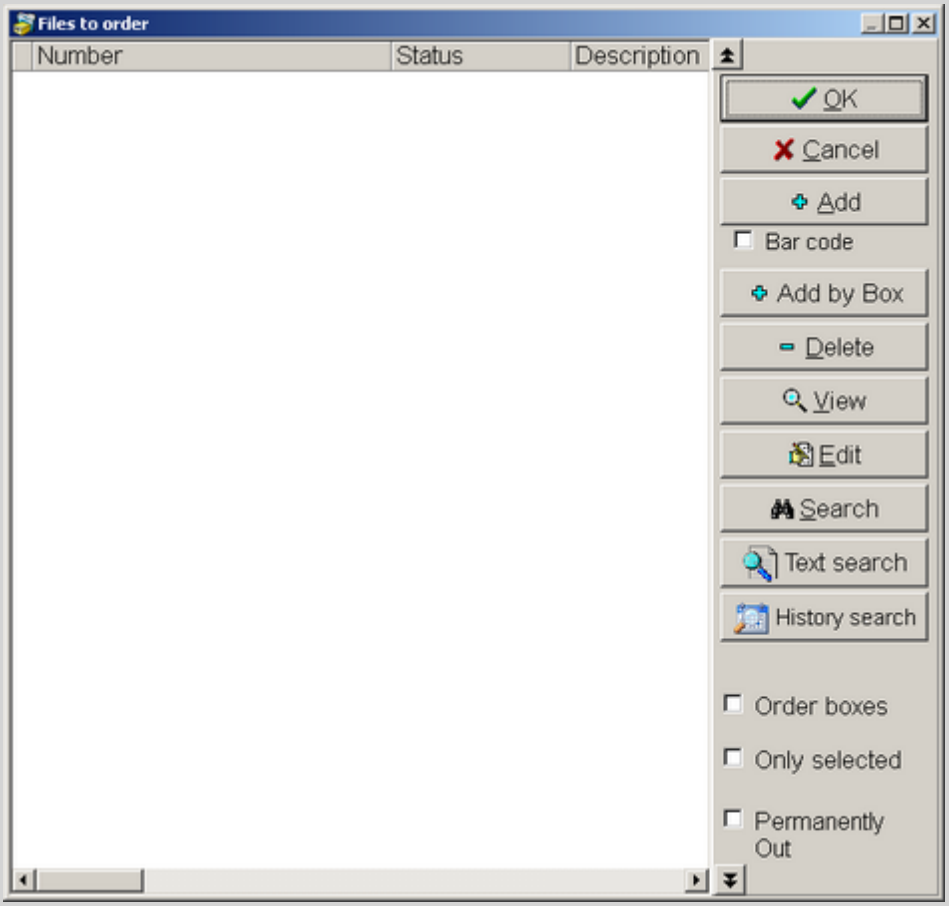

4 Perform one of the following operations :

- To manually add files, click on the Add button and enter a number or a description in the window that is displayed. The list of the customer's files appears. Select the desired items and press OK. The items are added to the selection and are displayed in the window opened in 3.
- To edit the information of a record, select a record (it will appear highlighted) and click on the Edit button.
- To add many files from the same box, click on the Add by Box button. A window appears.

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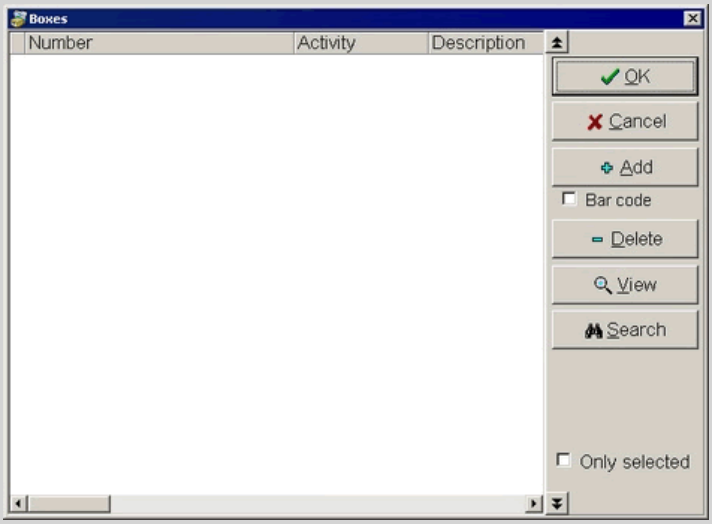
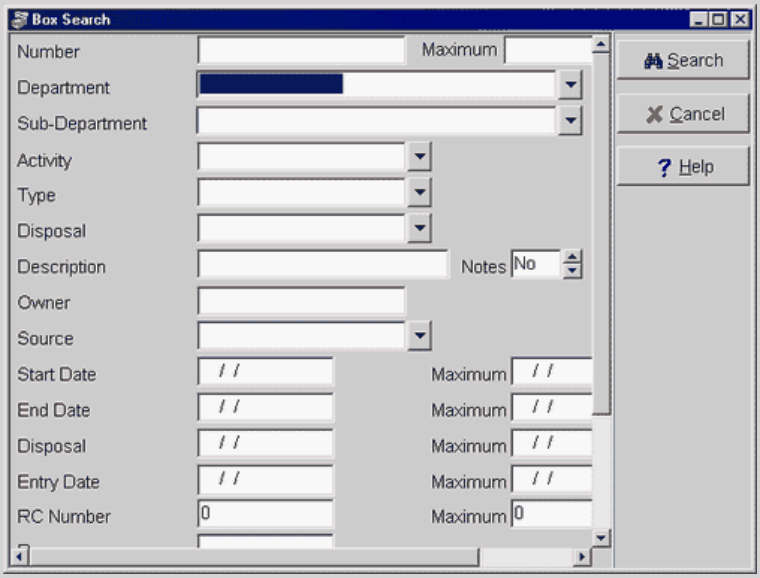


Click on the Add button, and enter a box number. The list of the customer's boxes appears. Select one or many boxes (they will appear highlighted) and press OK. Press OK in the Boxes window when all the boxes where added. All the files from the boxes selected appear in the Files to order window.

- To add items by performing a search, click on the Search button. A window appears.



Enter one or more search criteria and click on the Search button. All the boxes and files that correspond to the entered criteria are automatically added to the selection. They will appear in the window opened in 3.

- To remove an item from the selection, select it and click on the Delete button.
- To include only certain boxes or files from the list: select the boxes and files you want to add and check the field called "Only Selected".
- To add only the boxes to the order instead of all the files, check the field called "Order boxes".
- If the files are to be permanently removed from storage, check the "Permanently Out" check-box.

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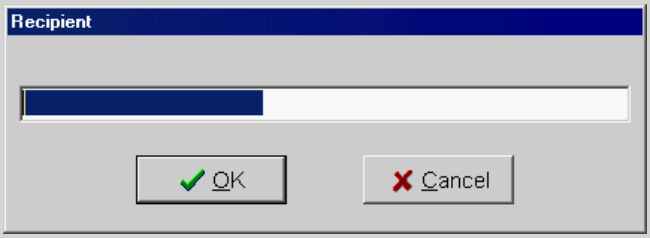
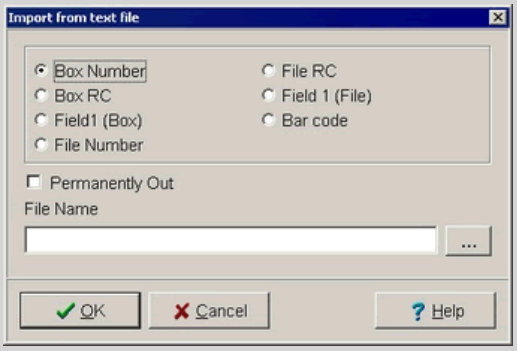
5 Click on the Accept button to confirm the addition of all the items to the order. The available files are added to the order and a message appears for each rejected item, indicating the reason of the reject (item not IN, insufficient access rights of the user, etc.).

Adding an item (or return item) by text file importation

1 To add items click on Item->Add Item->Import from text file. (To add return times, Click Item->Add Item->Returns/Pickups->Import returns from text file.) A window appears.



2 For returns enter a recipient and press **OK.** (If the customer uses charge back billing 250, you will also be prompted for a Charge Back code.) A window appears.



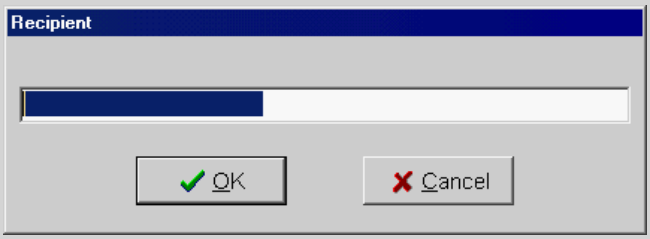
3 According to the record series that is ordered, check off the related options. Example: if you want to look for a file you might want to look for it either by RC number, by name or by number.

4 Enter a text file name or scroll the directories to find the right text file and press OK.

Note : Files for import must be text files, containing a column of data of the type specified - in this case, box numbers.

Adding an item by list importation

1 Click on Item->Add Item->Add to Order from List. A window appears.



2 Enter a recipient and press **OK**. (If the customer uses charge back billing 250, you will also be

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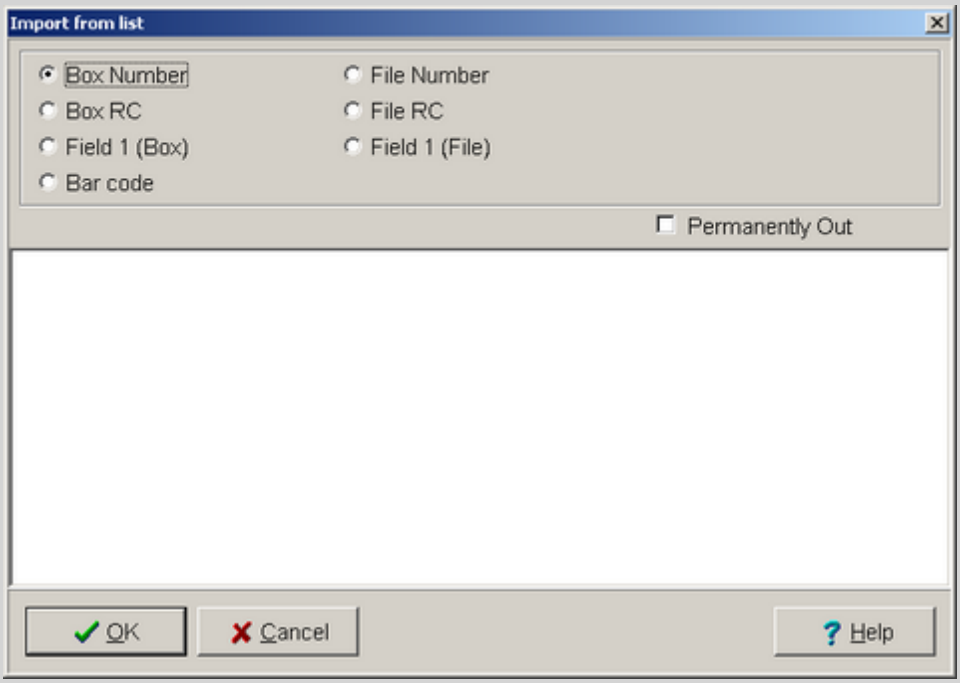
prompted for a Charge Back code.)
A window appears.



3 According to the record series that is ordered, check off the related options and write the information in the empty field at the bottom and press OK. Example: if you want to look for a file you would check off the File RC number option at the top and write the number in the empty field.
4 The software will automatically add the item(s). If the software does not find the information an error message will appear.

Adding items of an item set

In the Box and File modules, a field named Item Set[448] allows to associate any inventoried item to an item set. Consequently, when an item of an item set is ordered, all the items granted to that item set are automatically added to the order. If the user wants to exclude some of the items that were added automatically to the order, he just has to remove them manually before accepting the order.
To order items of an item set: simply order any item as usual, like boxes (or tapes), files, non-track files, etc (see previous operations). The system automatically sorts the other items of the item set and displays a message to indicate if some of these items are not available.

9.6.2.12 Adding special instructions to an order

The special instructions for an order are displayed on the delivery slip, and also on the paper picking list (if this option[367] is set to **yes** in the system information module).

The order is being created and the steps **1** to **6** of the section "Placing an order"[591] have already been performed. Special instructions can now be added to the order.

1 Click on **Edit**->**Special Instructions**. A report's window appears.
2 Enter the desired special instructions and press **OK**.

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3 Repeat the operation later if the instructions have to be modified before accepting the order.

Note: It is important that the order is being created. If the order is already accepted, the special instructions will not appear on the picking list or the delivery slip; it depends on the status of the order (see "Editing an order 615").

9.6.2.13 Editing an order

An order can be modified after having been accepted, but the delivery time may be affected (the choice is possible) and have a direct occurrence on the delivery date. Furthermore, the modifications that can be done depend on the order status when proceeding.

For all the operations described below, consider that an order has been created, accepted and is still on the screen.

The order is picked or being picked

Available operations :

- Editing the delivery address
- Editing special instructions
- Editing delivery type
- Editing the billing of an item

1 Click on **File**->**Edit Order**.
2 Click on **Edit**->**Delivery Address**. A window appears, containing the available delivery address for the customer.
3 Select a new delivery address and click on the **OK** button.
or
1 Click on **File**->**Edit Order**.
2 Click on **Edit**->**Special Instructions**. A report's window appears, containing notes if some have been entered when placing the order.
3 Enter new special instructions or edit the existing ones and click on the **OK** button.
or
1 Click on **File**->**Edit Order**.
2 Click on **Edit**->**Delivery Type**. A window appears, containing the available delivery types for the customer.
3 Select a new delivery type and click on the **OK** button.
or
1 Click on **File**->**Edit Order**.
2 Click on **Item**->**Edit Charge Backs**. A window appears, containing the order items.
3 Select the item in question and click on the **OK** button. Another window opens and asks to enter a charge back code.
4 Enter the new charge back code and click on the **OK** button.

The order is not picked

Available operations :

- All the operations of a picked order
- Adding items
- Editing order items
- Deleting order items

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1 Click on **File**->**Edit Order**.
2 Click on **Item**->**Add Item**.
3 Select the desired sub-menu and proceed such as described in the "Adding items to an order [602] " section.
or
1 Click on **File**->**Edit Order**.
2 Click on **Item**->**Edit Item**. A window appears, containing all the order items.
3 Select the desired item and click on the **OK** button. A new window will be displayed, different for each item. (For boxes and files, for example, it is possible to edit the recipient, as well as whether or not they are permanently out.)
4 Enter the modifications in question and click on the **OK** button
or
1 Click on **File**->**Edit Order**.
2 Click on **Item**->**Delete Items**. A window appears, containing all the order items.
3 Select the item to be deleted and click on the **OK** button.

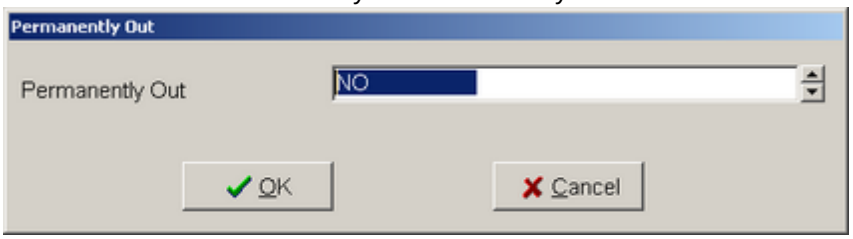
Note : The special instructions added or edited on a PICKED order will not be displayed on the picking list . The ones added or edited on a CLOSED order will not appear on the delivery slip. That is why it is important to take into account the status of an order before performing any modifications.

9.6.2.14 Edit Perm Outs

When placing an order, it is possible for a customer to specify that the item will be permanently out (marked as DELETED) if the item is not to be returned.

If it is necessary to edit which items are permanently out on the order, prior to delivery creation you may do so as follows:

1. In the **Orders->Order** module, navigate to the correct record.
2. From the menu, select **Item->Edit Perm Outs**.
3. A window appears listing order items including whether or not they are marked as permanently out. **Select the items** for which you wish to modify the status and click **OK**. A window appears



4. Set the desired status and click **OK**.
5. When the delivery is created, the items will go to the "Out" or "Deleted" status according to whether they are permanently out, and any space cancellations charges will be applied.

Note: Changes made after the delivery has been created will not affect the item status. Items that should have been marked permanently out can be processed on a deletion list. Items that should not have been marked permanently out can simply be return to the record center when it is time.

9.6.2.15 Edit Recipients

If the recipient for one or more item was incorrectly entered on an order, you may edit it as follows. Note that if picking labels have already been printed, you may wish to reprint these to reflect the change. Similarly, you may also wish to reprint the delivery slip if delivery creation has already occurred.

1. In the **Orders->Order** module, navigate to the order to be modified.

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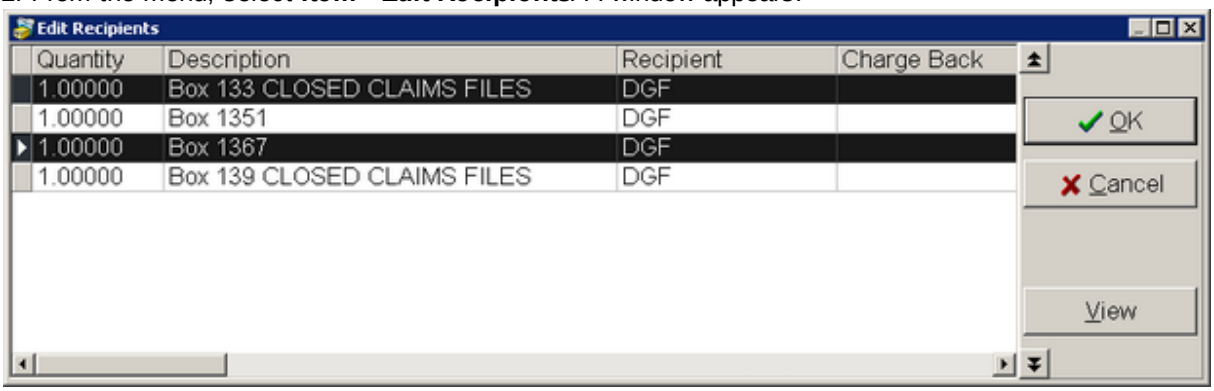
2. From the menu, select **Item->Edit Recipients**. A window appears.

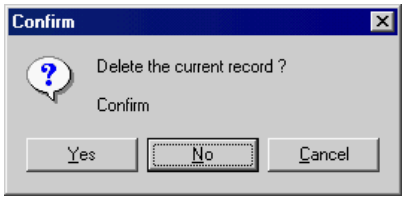


3. Select the items for which you wish to edit the recipients, and click the **OK** button.
4. In the dialogue window that appears, enter the correct recipient then click **OK**.
5. The recipients for these items has been changed. If necessary, reprint the picking labels[617] for these items, and if the delivery slip has already been printed, reprint the delivery slip[630].

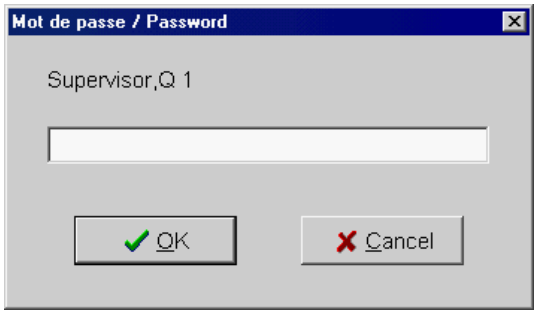
9.6.2.16 Deleting an order

An order can be deleted directly in the Order module as long as it is not being picked.

1 Click on **Orders->Order** from the Main window.
2 Search for the desired order and keep it on the screen.
3 Click on **File->Delete Order**. A dialog box appears and asks to confirm the operation.



4 Click on the **Yes** button to confirm the deletion. A window appears and asks to enter a password.



5 Enter a password and press **OK**.

9.6.2.17 Printing thermal labels

After having entered and accepted an order, it is possible to print the labels that will be used for the processing of the items on the order.

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1 Click on **Order**->**Order** from the Main window.
2 Search for the desired order and keep it on the screen.
3 Click on **File**->**Print Thermal Labels**.
4 Select the boxes or files concerned and press **OK**. The labels are printed automatically.

For boxes
Only one label is printed and must be affixed on the box. It essentially contains the following : the customer code, the order number and date, the box number and description, and the recipient.
The "Delivery Labels" option must be previously activated in the Customer Information module to apply here.

For inventoried files
Two labels are printed. The first one contains the customer code, the order number and date, the mention "on file", the information about the file (number, description, RC number, box number where the file is stored), the recipient, and must be affixed on the file. The second label contains the same information, but with the mention "on card" and also contains the bar code of the file. It must be affixed on the out card inserted in the box.
This function is available all the time.

***For non track files**
Two label are printed. The first one contains the customer code, the order number and date, the mention "on file", the information about the file (number, description, RC number, box number where the file is stored), a bar code to identify the out operation, and it must be affixed on the file. The second label contains the same information, but the mention "on card", a bar code for the return operation and the bar code number present on the first label. The second label is affixed on the out card inserted in the box.
This function must be previously activated in the Customer Information module to apply.

9.6.2.18 Viewing information about the current order

It is possible to view information about the current order without printing or viewing the picking list or the delivery slip.

Viewing the delivery address of the current order

1. Click on **Order->Order** from the Main window.
2. Get the desired order on the screen.
3. Click on **View->Delivery Address**. The report's window opens on the screen and indicates the delivery address of the order.
4. Click on the **Close** button to end the viewing.

Viewing the items of the current order

1. Click on **Order->Order** from the Main window.
2. Get the desired order on the screen.
3. Click on **Item->View** Items. The result's window appears and indicates all the order items.
4. After consultation press **OK** to close the window or select an item and click on the **View** button to produce its detailed report (this report can be printed).

Viewing an estimate of charges for an order

1. Click on **Order->Order** from the Main window.
2. Get the desired order on the screen.
3. Click on **View->Order Charges**.

Note: Actual charges are based on deliveries rather than orders. The charges listed on this report are those that would be charged for a delivery including only this order.

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Viewing purchase orders

1. Click on **Order->Order** from the Main window.
2. Get the desired order on the screen.
3. Click on **View->Purchase Order**.
4. An information window will appear giving the number of the purchase order(s) of the customer associated with the current order.
5. Press **OK**.

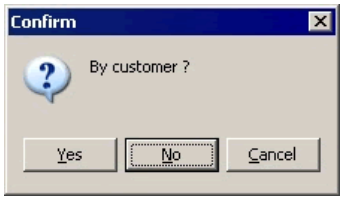
Viewing ordering notes (Alt + F10)

1 Click on **Order->Order** from the Main window.
2 Get the desired order on the screen.
3 Click on **View->Ordering notes**.
4 A window will appears with the ordering notes for the customer. To edit the note enter the changes and press the **Save** button.

9.6.2.19 Viewing or printing reports

Producing a list of the orders not-closed

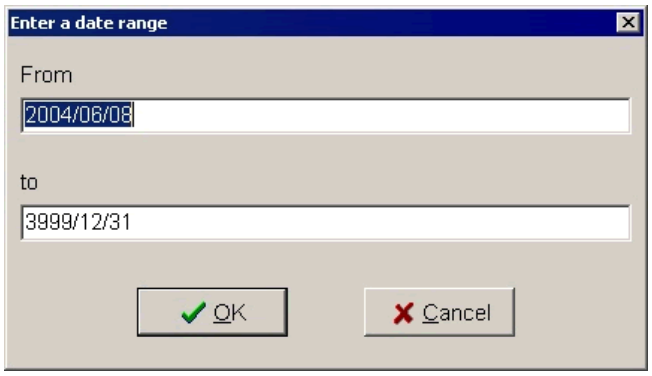
1 Click on **Orders->Orders** from the Main window.
2 Click on **Files->View Orders|Print Orders->Orders not-closed**. A message appears.



3 To select a customer press Yes. Enter the customer code or press **OK** to have the list of customers (select a customer and it will appear highlighted). Press **OK**.
4 A report is automatically created.

Producing a list of orders by date

1 Click on **Orders->Orders** from the Main window.
2 Click on **Files->View Orders|Print Orders->Orders By Date**. A window appears.



3 Enter a date range. Press **OK**.
4 A report is automatically created.

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Producing the picking list for the current order
1 Get the desired order on the screen.
2 Click on **File**->**View Picking List**|**Print Picking List**. The report appears on the screen or is automatically printed from the default printer.

Producing the list of charges for the current order
1 Get the desired order on the screen.
2 Click on **View**->**Order Charges**. The report is automatically displayed on the screen. Click on the **Print** button to print it or on the **Close** button to end the operation.

Producing the list of the authorized users for the selected customer
1 Click on **Orders**->**Order** from the Main window.
2 Click on **View**->**Authorized Users**. A window appears and asks to enter a customer code.
3 Enter the code of the desired customer and press **OK**. The report is automatically displayed. Click on the **Print** button to print it or on the **Close** button to end the viewing.

9.6.3 Picking List

9.6.3.1 Overview (Picking List)

Once orders have been entered and accepted, the ordered items become available to be picked. Rush orders are picked individually using the Pick-and-run[602] process through the Orders->Orders module.

Regular orders may be picked more efficiently by creating picking lists, which typically include items from several orders. Picking lists should be generated after each picking cut off time in order to be ready for the next delivery cycle. More active record centers may chose to generate additional picking lists earlier.

Available reports

- None. (See the Report[501] module)

Fields[621] (File->create picking list)

Distinctive menu options:

File menu
- Create picking list[622]
- Upload pick results[623]
- Reset picking list[623]
- Reset Fast order pick list[624]
- Manual Picking[624]
- ***rcMobile picking lists

Module window: (File->create picking list)

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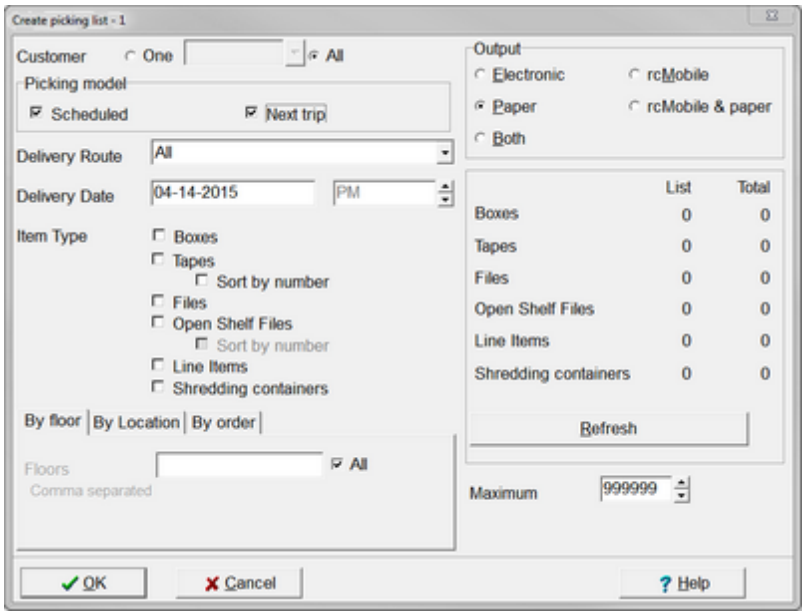

9.6.3.2 Picking options

Here is a description of the options available when creating a picking list.

Customer

To limit picking to a specific customer, click on **One**, and select a customer from the list. Otherwise, available items from all customers will be included

Picking model

You may select *Scheduled*, *Next trip*, or both.
Scheduled orders are for a specific delivery cycle, while next trip orders can be fulfilled on demand, for example the next time that you are performing a specified delivery route.

Delivery Route

You may select all delivery routes, or you may select items for deliveries to addresses on specified delivery routes. This is especially useful if your drivers do their own picking, e.g. for tape accounts.

Delivery Date

The picking list will be limited to include items for this delivery date and time.

Item Type

Item types not selected will be excluded from the list. Items are typically sorted by location unless the option to **sort by number** is selected.

By floor

The default behavior is to create a picking list for all floors (or picking levels) of the building. If the All check-box is not selected, you may specify which picking levels to include on the list, separating with commas if multiple are selected.

By location

This section permits you to limit the picking list to include items from the range of locations that you provide.

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By order

Entering order numbers in this section will limit the picking list to specific order numbers.
To add an order to the list press the **Add** button, select an order in the list that appears (it will become highlighted) and press **OK**.
To delete an order from the list, select the order (it will appear highlighted) and press the **Delete** button.

Maximum

Limits the total number of items that the list can contain. This is useful for splitting large picking lists among multiple PDTs (or into multiple lists on the same PDT.)

Output

Electronic output is the most commonly used option, which refers to picking with the PDT[762].
Selecting Paper causes the picking list to print on the default printer. When picking without any PDT, it is necessary to manually notify EDC RC that items have been picked[624].
Using Both paper and electronic output permits one or more people to retrieve items using the paper list and then confirm with the PDT, which is useful when more people than PDTs are available.

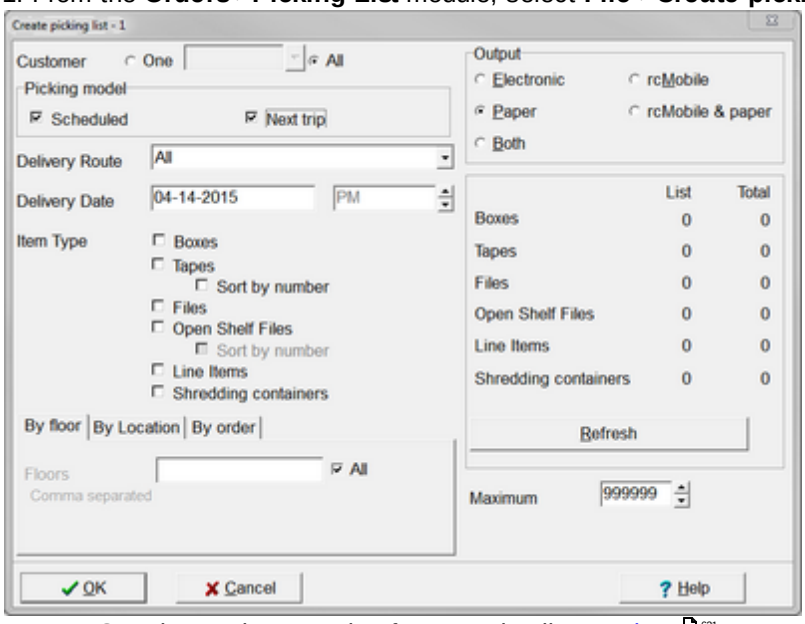
The new options of rcMobile and rcMobile & paper will be implemented after version 7.0, and are useful if you are set up to use rcMobile within your warehouse.

List / Total / Refresh

The numbers under Total indicate how many of each item type are on orders to be picked, while the numbers under List show how many are on the picking list. Clicking the Refresh button causes the list to be re-calculated.

9.6.3.3 Creating a picking list

1. From the **Orders->Picking List** module, select **File->Create picking list**. A window opens



Note : See the previous section for more detail on options[621].

2. Select the desired options to create a picking list, including the item types and the desired output format.

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Typically, line items and shredding containers are only included in the final pick for efficiency.

(Notice the list of total available items to be picked to the far right of the pane. After specifying picking options, clicking the **refresh** button will update the number of items on the list.)

3. Press the **Okay** button. If a paper or both output options were selected, the picking list will print. This may be separated by picking level, if this option was selected in the customer information module.

4. If Electronic or Both output options were selected, you will be prompted to prepare the prepare the PDT for download. Place the PDT in the cradle or connect it to the cable, then press **2** to receive. Then click **Okay** on the computer.

- Picking labels will be printed automatically for PRE-ADD or ALL files, depending on the Print Picking Labels setting in the System Information module[365].
- File out card and open-shelf out card labels and box picking labels may be printed according to options in the Customer Information module[248].

9.6.3.4 Uploading picking results

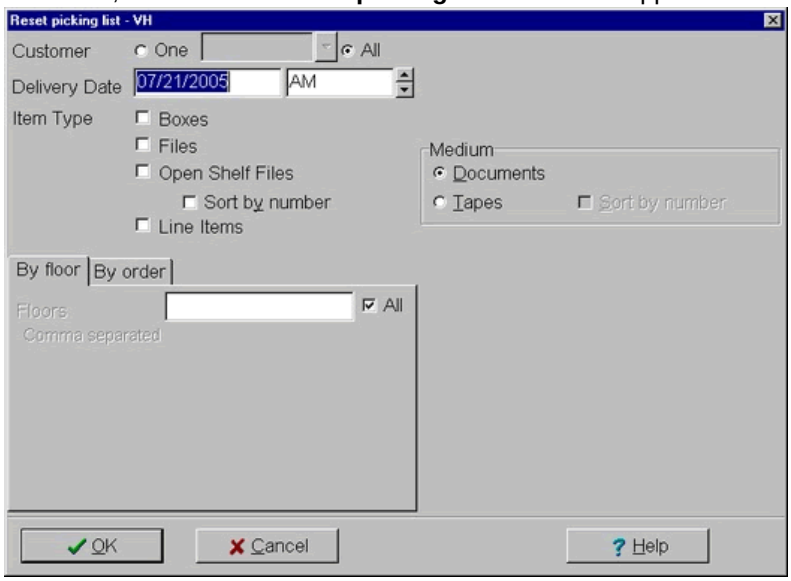
1 Click on **Orders->Picking List** from the Main window.
2 Proceed to the creation of a picking list (see the previous section[622] for more details).
3 Click on **File->Upload Pick Results**. The results are automatically downloaded to the PDT[871].

Note : The PDT must be ready before proceeding to upload the results.

9.6.3.5 Resetting a picking list

If a picking list is lost, it is possible to put the items that were on it back into the list of items to be picked as follows:

1. Open the **Orders->Picking List** module
2. From the menu, select **File->Reset picking list**. A window appears.



3. Enter parameters, then click **OK**.

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Items meeting these criteria will go from the Being picked state to the To be picked state, and can be put onto a new picking list.

Note: If multiple outstanding picking lists meet these criteria, they will all be reset. Items on completed picking lists are in the Picked state, and will not be affected.

Picking lists created using **Orders->Order**, **File->Pick and run** can be reset using Reset fast order picklist 624.

9.6.3.6 Resetting a Fast order pick list

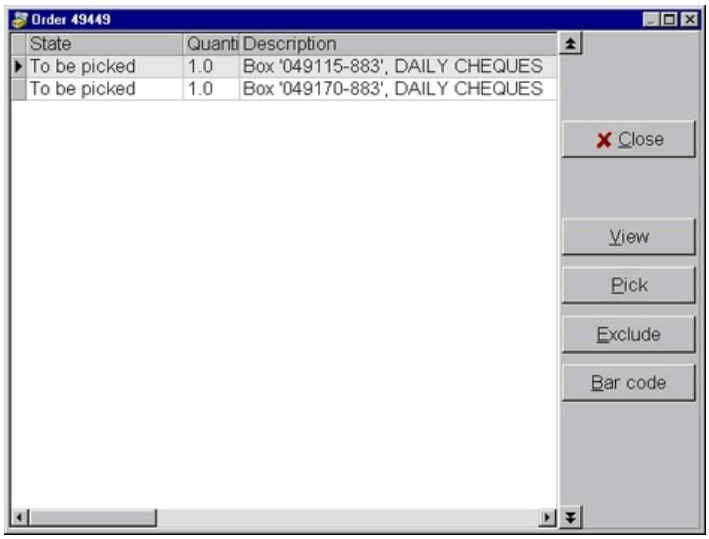
This option allows you to reset an outstanding picking list created using the **Orders->Order**, **File->Pick and run** method.

1. Open the **Orders->Picking List** module
2. From the menu, select **File->Reset a fast order pick list**. A window appears.
3. Enter the order number and press **OK**.

Items for this order are once again available to be picked using the pick and run option 602, or manually 624.

9.6.3.7 Picking items manually

1. Click on **Orders->Picking** List from the Main window.
2. Click on **File->Manual** picking. A window appears.
3. Enter the order number for which you want to pick items manually and press **OK**. A window appears.



4. To mark items as "Picked", select the wanted items (they will appear highlighted) and press the **Picked** button.
5. To mark items as "Excluded", select the wanted items (they will appear highlighted) and press the **Exclude** button. A window appears.

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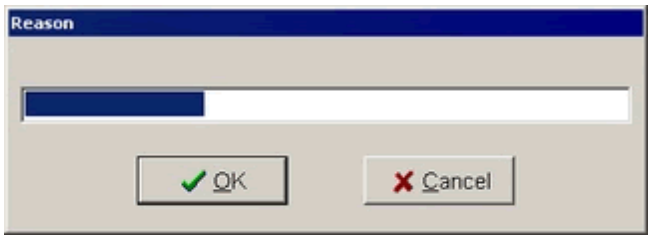
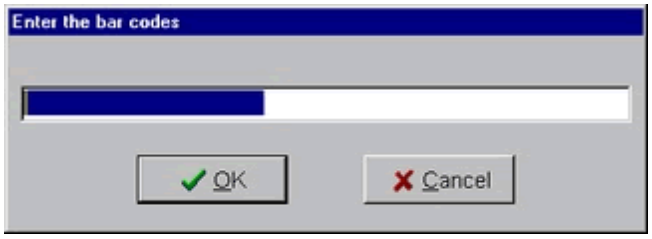


6. Enter a reason and press **OK**.This information will be included with the box and intended recipient on the delivery slip and an excluded items report at the time of delivery creation.

7. To mark items as "To be picked" again, select the same items (they will appear highlighted) and press the **Picked** button.

Note: If the delivery type is by time or 24 hours (ie by night orders or rush orders) the delivery will be closed as soon as the order is manually picked.

To pick items by scanning / typing the bar code, press on the **Barcode** button. A window appears



One can enter the bar code(s) manually or scan them with a keyboard wedge scanner.

9.6.3.8 rcMobile Pick Lists

This menu shows a lists of picking lists created through rcMobile and permits you to delete unprocessed lists if necessary.

This functionality is not fully implemented in version 7.0 but will be available in a technology preview release a some point during the year.

***

9.6.4 Delivery Creation

9.6.4.1 Overview (Delivery Creation)

In the systematic work flow at a record center, deliveries are created after all items for the delivery cycle have been picked. This happens after the picking cut-off times defined in the System information[365] module[365] and potentially over-ridden for specific customers in the Customer information[248] module[248].

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Available reports

- None. (See the Report[501] module)

Tasks

- Creating a delivery[627]

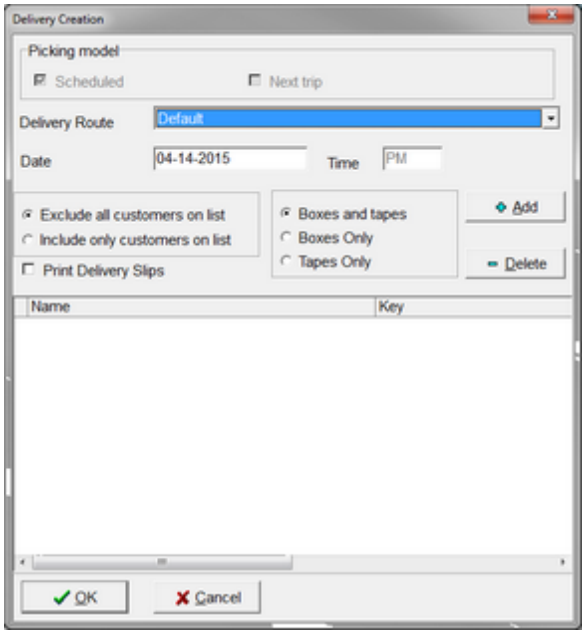
Distinctive menu options:

- None

Related topic

Creating the exclusion list for deliveries[378]

Module window



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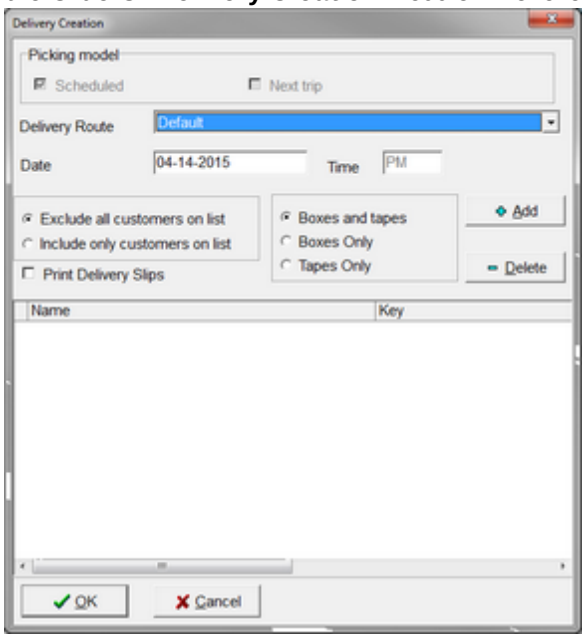
9.6.4.2 Creating one or many deliveries

1. Open the **Orders->Delivery Creation** module. The following window is displayed:



2. Make any necessary modifications to the default delivery creation parameters:

- If you have both scheduled and next trip delivery types in use at your record center then you will be required to select the picking model(s) to create deliveries for.
- The **delivery date** and **time** will default to the current delivery cycle. If desired, change this.
- If you wish to create deliveries only for **"tape only"** customers separately, select the corresponding option.
- The lower panel of the window contains an **exclusion list**[378] specifying customers for whom deliveries are created separately. This is defined in the System Information[364] module, and may be temporarily modified here by clicking on the **Add** or **Delete** buttons to add or remove customers from it. To create deliveries for the rest of the customers, accept the default setting of **Exclude all clients on list**. To create the non-standard deliveries, select the "**Include only clients on list**" option.

- If you wish to print delivery slips, check the "**Print Delivery Slip**" checkbox. Note that delivery slips may reprinted through the delivery module, and a commonly printed through the Delivery Route[639] module. Slips for deliveries that cannot be included on delivery routes will be printed on delivery creation even if this option is not selected.

3. Press **OK**. The system will create deliveries according to all the parameters previously selected.

Notes:
- If orders for a delivery were not completely picked, that delivery will go to the Created state instead of directly to the Closed state.
- If all items for the delivery were excluded during picking and there are no returns or line items, the delivery will become verified, and no trip charge or fuel surcharge will be applied.

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9.6.5 Delivery

9.6.5.1 Overview (Delivery)

This module permits various operations on individual deliveries once they have been created, including making changes and adding items. It is possible to perform truck validation in this module. However, it is more efficient to do this through the Delivery Route[639] module if validating more than one delivery[643].

Available reports

- picking list for the current delivery
- delivery slip for the current delivery
- individual report of items for one delivery

Fields[629] (see the next section)

Distinctive menu options:

File menu

- View | Print picking list[629]
- View | Print delivery slip[630]
- View | Print delivery calendar[630]
- Truck validation[631]
- Download list to PDT[633]
- Add Labor[634]
- Print recipient labels[632]
- Print address labels[632]
- Check item delivery[632] number

View menu

- View orders[634]
- View items[634]
- History[634]

Edit menu (adding services to a delivery)

- Box retrieval[633]
- File retrieval[633]
- Box sale[633]
- Box returns[633]
- Line item[633]
- Box search[633]
- File search[633]
- *** Override quantity shipped[634]

Module window:

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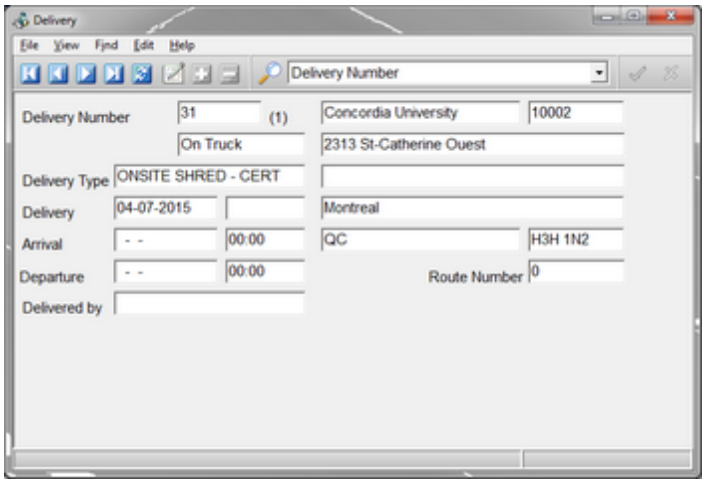

9.6.5.2 Fields (Delivery)

Delivery Number

Unique number assigned by the system upon delivery creation, followed in brackets by the building from which the items are delivered.

Status

Status of the delivery (Delivery "state" in the table, for use in report).

- Created: delivery was created but orders are not fully picked (0)
- Closed: all items have been picked (1)
- On truck: truck validation has been completed (5)
- Delivered: the delivery return has been started but not completed.(4)
- Returned: the return has been completed, but items remain to verified to permanent locations (2)
- Verified: all return items have gone to permanent locations. (3)

Type

Delivery type[722], as defined by the record center in the Accounting->Delivery Type module.

Delivery

Date and time in the day (AM or PM) when the delivery has to be done.

Arrival, Departure, Delivered by

Information collected when the delivery is performed with PDT.

Customer Information

Customer name, customer key[248], and delivery address[329] associated with the delivery.

Route number

Once the delivery has been assigned to a route in the Orders->Delivery Route[639] module, the route number will appear here.

9.6.5.3 Viewing or printing a picking list

1 Click on **Orders**->**Delivery** from the Main window.
2 Click on **File -> View|Print picking list**
3 A window appears.

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4 Click **Yes** if you want the labels to be printed as well. Click **No** if you do not want them printed (click **Cancel** if you want to abort the present operation.)
5 The picking list will automatically appear or be printed.

9.6.5.4 Viewing or printing a delivery slip

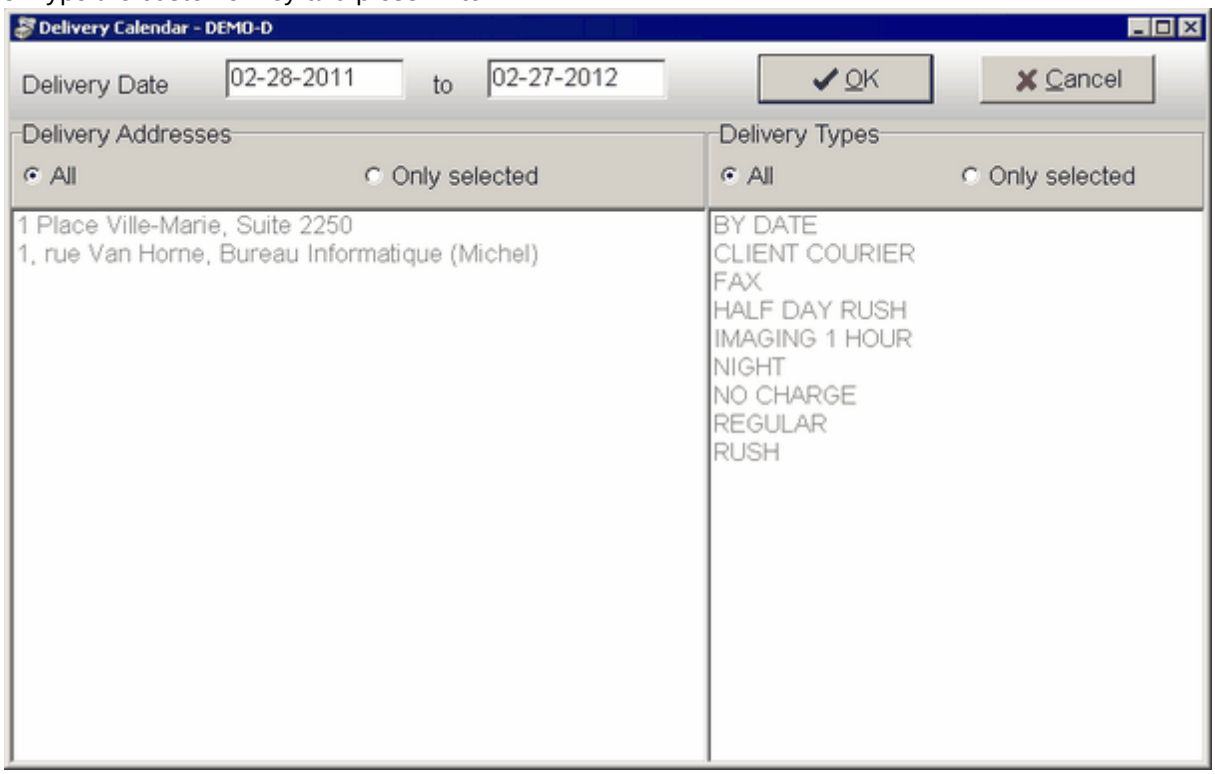
1 Click on **Orders->Delivery** from the Main window.
2 Click on the **Cancel** button
3 Click on **File -> View|Print delivery slip**
4 The delivery slip will automatically appear or be printed.

9.6.5.5 Viewing or printing a delivery calendar

The delivery calendar is designed to help your customers verify their past and future delivery dates. EDC RC enables you to automatically include a calendar of dates on which deliveries occurred for the past 6 months, as well as scheduled delivery dates for the next 6 months as an invoice attachment[265].

You may also run this report for a specified date range as follows:

1. Open the **Orders->Delivery** module.
2. From the menu, select **File->View | Print Delivery Calendar**.
3. Type the customer key and press **Enter**.



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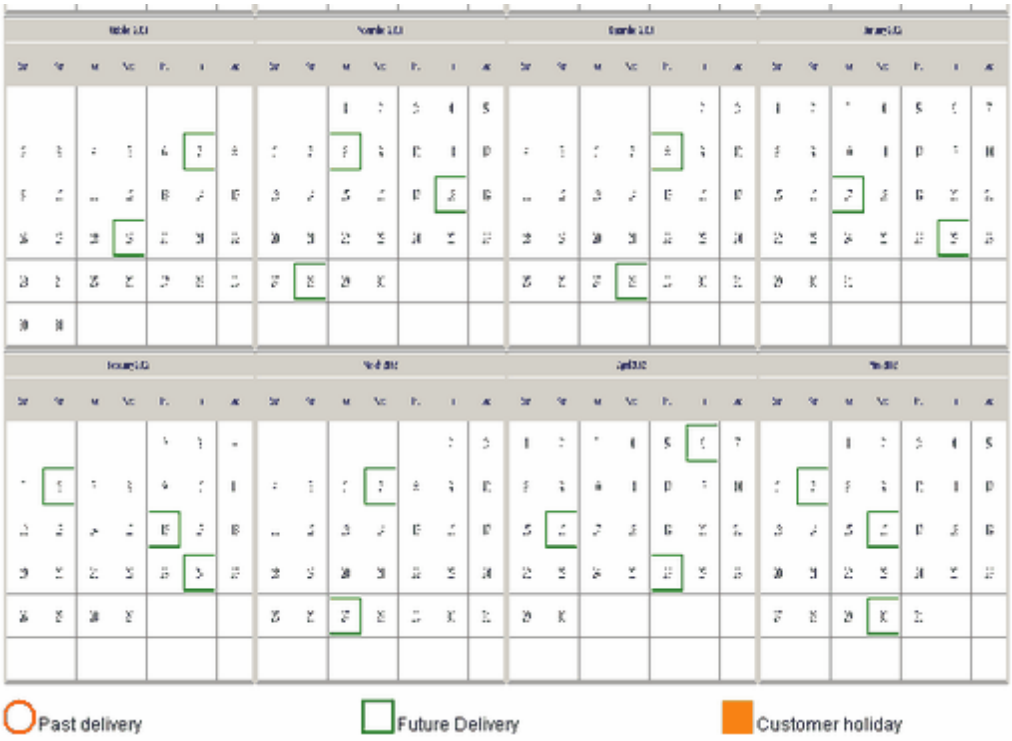
4. Specify the delivery data range, the delivery addresses, and the delivery types to include, then click **OK**.



5. The calendar will appear, with past deliveries enclosed in a red circle, future deliveries in a green square, and customer holidays highlighted in yellow. (Note that this document is designed to print nicely or be included as a PDF document. It may appear strange on your screen.)

9.6.5.6 Performing a truck validation for a delivery

Note: If more than one delivery is being validated, it is much more efficient to do so using a delivery route[643] in the Orders->Delivery Route module[639] than to validate each delivery separately.

If you are using rcMobile, then this step is replaced by packaging of tapes and files into transport containers[218], and then Truck Validation with rcMobile[222]

1. Open the **Orders->Delivery** module
2. From the menu, select **File ->Truck validation->Download list to PDT**. A message to prepare PDT for download appears.
3. Prepare the PDT[762] to receive information (1-Receive)
4. Perform the validation with PDT
- 3-Processing
- 7-Truck validation
- enter or scan the delivery number
- enter or scan the items' bar codes
- when you are finished press 0 and Enter. For customers that bill by container, the PDT will ask the "Qty shipped"; enter the number of containers on the truck and press Enter
5. In the **Orders->Delivery** module, select **File ->Truck validation->Upload list from PDT**. A "Downloading" message appears.
6. Send the information from the PDT[762]
- 2-Send results
- 7-Truck validation

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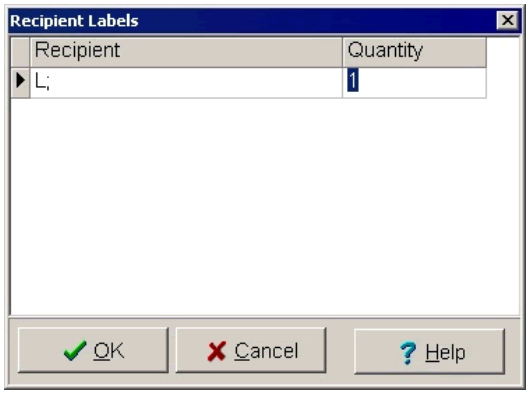
- select a delivery by entering its number or press 1-All and Enter to upload them all

9.6.5.7 Printing recipient labels

1 Click on **Orders**->**Delivery** from the Main window.
2 Click on **File -> Print recipient labels**. A window appears.



3 Select the quantity of labels wanted for each recipient and press **OK**

9.6.5.8 Printing address labels

Address labels may be useful when using external courier for delivery. To print an address label for the delivery:

1. Open the **Orders->Delivery** module
2. Navigate to the desired delivery
3. From the menu, select **File->Print address labels**., or press the **F8** key.
4. Enter the quantity of labels to be printed.

9.6.5.9 Display the delivery number of an item

This allows the record center to find the delivery number of an item.

1 Click on **Orders**->**Delivery** from the Main window.
2 Click on **File -> Check Item Delivery**
3 A window appears.

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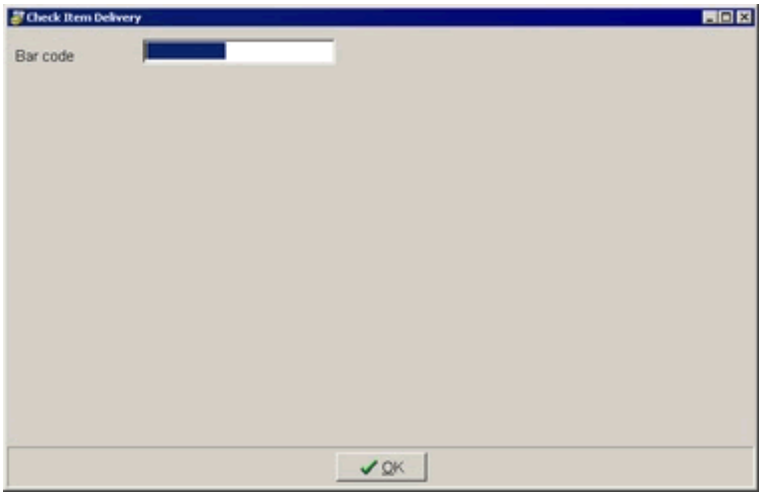
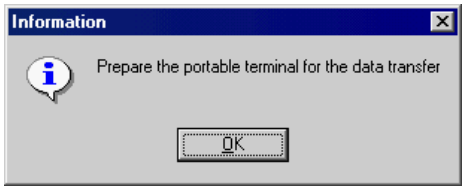


4 Enter the item's bar code, press Enter (on the keyboard)
5 The item's delivery number and the delivery state will appear. To exit press **OK**.

9.6.5.10 Downloading a delivery to the PDT

When setting the Delivery with PDT[248] field to Yes in the Customer Information module, the order items of a customer can be delivered with the PDT. The deliveries are downloaded to the PDT in the Delivery Route[644] module (it downloads an entire route) or in the current module (only the current delivery is downloaded).

1 Click on **Orders**->**Delivery** from the Main window.
2 Search the desired delivery and keep it on the screen, then click on **File**->**Download list to PDT**. A dialog box appears.



3 Prepare the PDT to receive the data and press **OK**. All the items of the current delivery are downloaded to the PDT, delivered as returned items. The employee of the record center will just have to deliver the items as described in the "Delivering items with the PDT[170] " section.

9.6.5.11 Adding services to a delivery

1 Click on **Orders**->**Delivery** from the Main window.
2 Find the desired delivery, keep it on the screen and perform one of the following operations :

- To add a box click on **Edit**->**Box Retrieval**.
- To add a file click on **Edit**->**File Retrieval**.
- To add a box sale click on **Edit**->**Box Sale**
- To add a document return click on **Edit**->**Box Returns**.
- To add a document search click on **Edit**->**Search**.
- To add other services click on **Edit**->**Line Item**.
- To add a box or file search click on **Edit**->**Box Search**|**File Search**.

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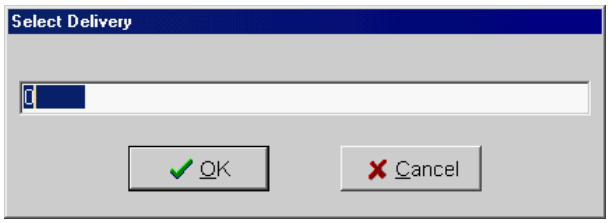
3 For each of these operations, follow the procedures described in the "Adding items to an order [602] " section of the Order module.

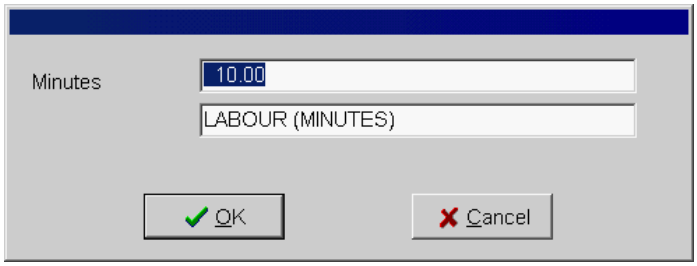
Note: The delivery must be in the CREATED, CLOSED or ON TRUCK state.

9.6.5.12 Adding labor to a delivery

1 Click on **Orders**->**Delivery** from the Main window.
2 Click on **File**->**Add Labor**. A window appears.



3 Enter the desired delivery number and press **OK**. A window appears.



Note : When the customer is billed by department or charge back (settings of the Customer Information [250] module) a window appears previously, in order to specify who will be charged for the labor.

4 Enter the quantity of labor minutes to add to the delivery and press **OK**.

9.6.5.13 Viewing the information about the current delivery

Viewing the orders of the current delivery
1 Click on **Order**->**Delivery** from the Main window.
2 Click on **View**->**View Orders**. The list of the orders included on the current delivery is automatically displayed. Press **OK** to end the operation.

Viewing the items of the current delivery
1 Click on **Order**->**Delivery** from the Main window.
2 Click on **View**->**View Items**. The report's window is automatically displayed. Press **OK** to end the operation.

Viewing the history of the current delivery
1 Click on **Order**->**Delivery** from the Main window.
2 Click on **View**->**History**. The report's window is automatically displayed. Press **OK** to end the operation.

9.6.5.14 Overriding the quantity shipped

For accounts there the billing for delivery handling is based on the quantity of containers shipped, this amount is calculated by adding up the quantity of boxes on the order along with the quantity of transport

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containers containing tapes or files.

If you need to override this quantity, you may do so as follows:
1. Open the **Orders->Delivery** module.
2. Navigate to the desired delivery.
3. From the menu, select **Edit->Override quantity shipped**.
4. When prompted, confirm that you wish to override the quantity shipped, by clicking **Yes**.
5. Enter the new quantity, and click **Okay**.

If the account is billed by container, then the delivery charges will now reflect the new quantity.

(Note that similar functionality is available through the **Accounting->Delivery Billing** 712 module. This is because these two options would generally be used by different types of employees.)

9.6.6 Imaging on Demand

9.6.6.1 Overview (Imaging on Demand)

Delivering files electronically rather physically can be a convenient, cost-effective, and environmentally-friendly option. The processing of Imaging on demand orders and deliveries is very similar to that of physical ones, except that documents are uploaded using this module, for viewing through ActiveWeb (which requires a license that includes imaging) or EDC ActiveFile.

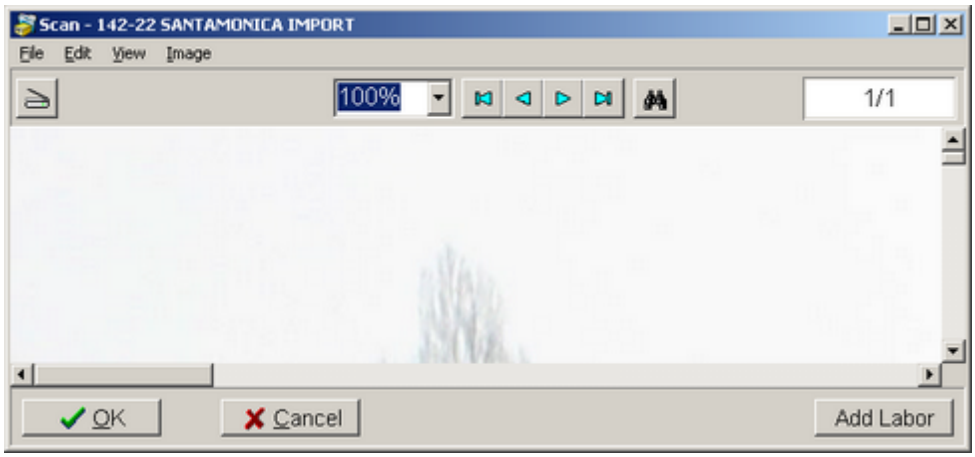
Available reports

- None. (See the Report 501 module)

Distinctive menu options:

File menu
- Scan items for a delivery 636

Module window:



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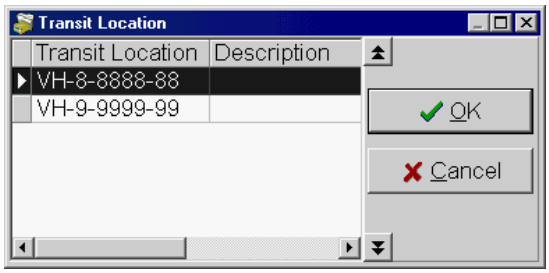
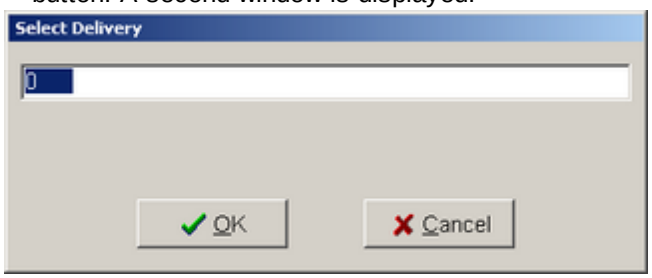
9.6.6.2 Scanning items for a delivery

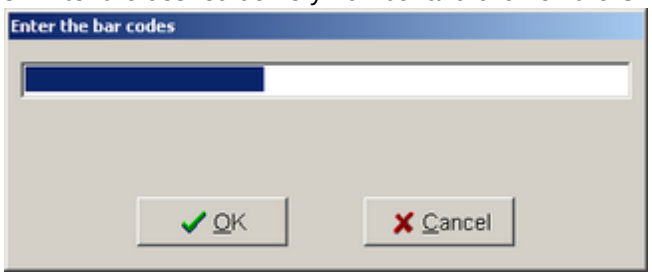
1. Open the **Orders->Imaging On Demand** module. If your building uses multiple transit locations then a window appears.



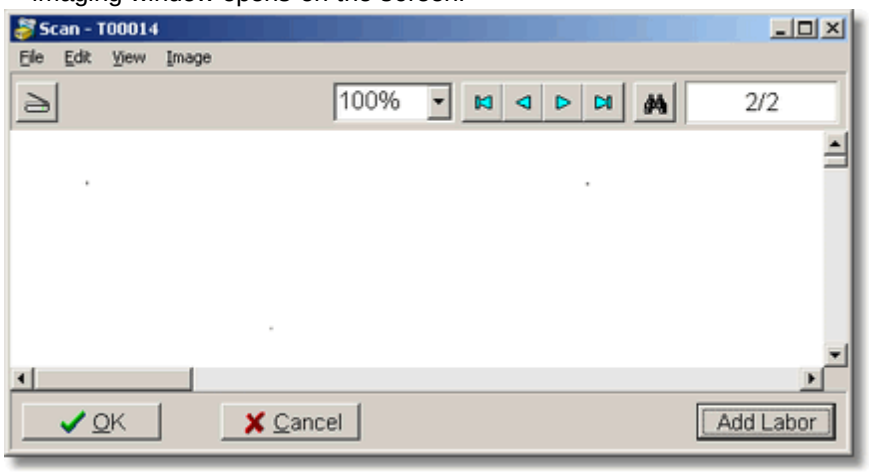
2. Select a transit location where the files will be stored before being scanned and click on the **OK** button. A second window is displayed.



3. Enter the desired delivery number and click on the **OK** button. Another window appears.



4. Scan or enter the bar code of a first file that must be scanned and click on the **OK** button. The imaging window opens on the screen.



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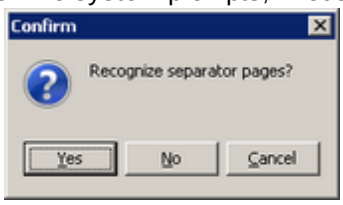
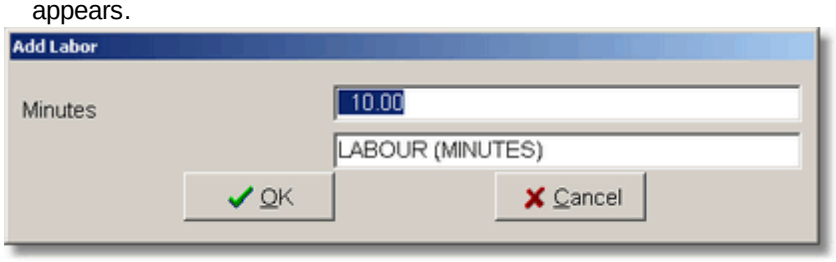
5. You may scan images directly, or import them. (see Imaging on demand - importing images[639])
6. If a scanner has not been previously selected, click on **File->Select scanner** and choose one of the scanner engine attached to the workstation.
7. Prepare the document that will be imaged and click on **File->Scan**.
8. The system prompts, "Recognize separator pages"?

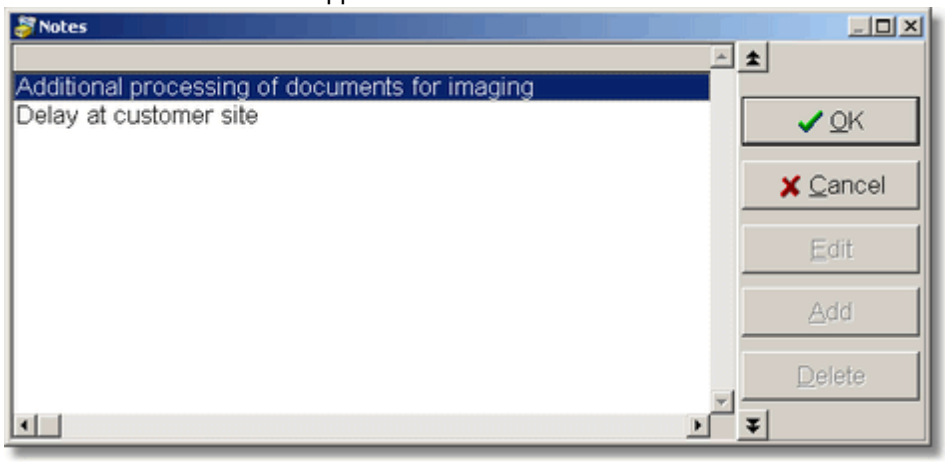


- If the document has EDC image separator pages inserted between sections, click **Yes**, otherwise click **No**.

9. A window appears, different for every scanner engine.
10. Proceed to the imaging by following the indications of the scanner. When the scanning is done, the scanned images appear on the window opened in 4.
11. Edit the image document[639] (optional)
12. If it is necessary to add labor charges, you may do so by clicking the **Add Labor button**. A window appears.



13. A list of available notes appears



14. Select the desired message, then click **Ok**.

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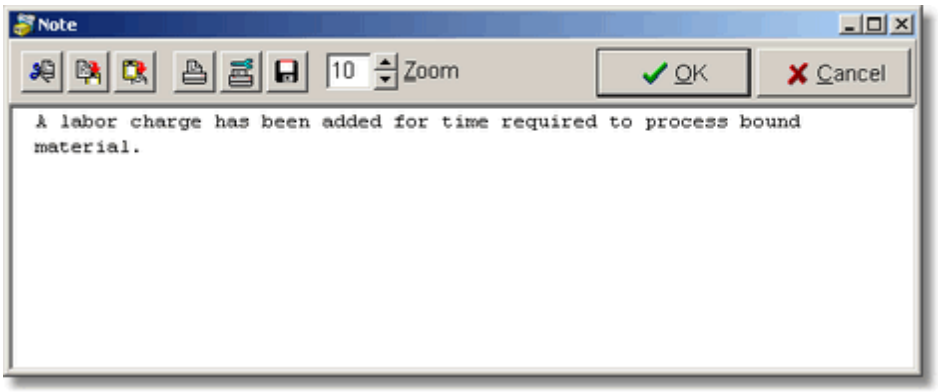
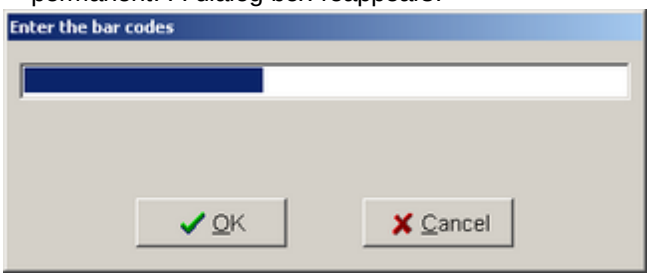
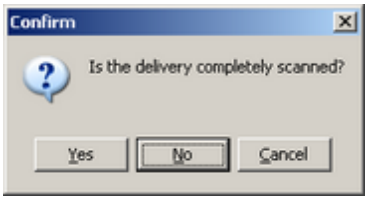


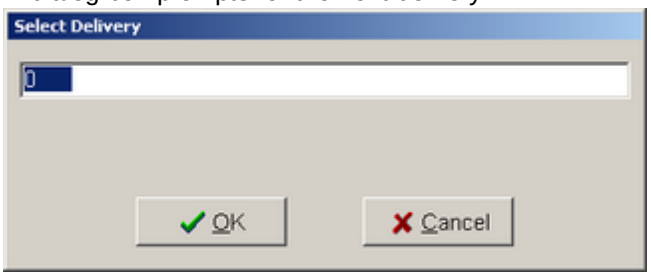
15. Edit the notes if necessary, then click **Ok**.
16. Click on the **OK** button to save the images, and then **Yes** to confirm that images will become permanent. A dialog box reappears:



17. Repeat the above steps while additional files remain to be scanned on the same delivery, then click the **Cancel** button once all items for the delivery have been scanned. A dialog box appears.



18. Click the **Yes** button if this delivery is complete, or **No** if additional items will be scanned later. A dialog box prompts for the next delivery.



19. Scan the next delivery, or click the **Cancel** button when done.

As soon as a delivery is completely scanned, the an e-mail with a link to ActiveWeb (as specified in the System Information module)[374] is sent to the authorized user on the order. The delivery will automatically be set as delivered and as returned.

Note : An SMTP address[365] for the system (System Information module) and an email address[304] for the user (Authorized User module) must have been set beforehand. For instructions on setting up a customer to using imaging, see "Setting up a customer to use Imaging[130] ".

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9.6.6.3 Editing an image

Between scanning and image and saving it, it is possible to perform some edits.

1. Perform imaging on demand[636], until the image has been scanned but not saved
2. From the imaging window, select the desired image editing option, as described for the imaging module[474]. (Note that not all options are available.)

9.6.6.4 Importing images

In addition to scanning images through the imaging on demand module, you may also import images of type bmp, png, eps, afi, vst, tga, dcx, pcc, pcx, jpeg, jpg, tif or tiff.

1. Perform imaging on demand[636] until the file bar code has been scanned, opening an imaging window.
2. From the menu, select **File->Import** A window appears, different for each computer.
3. Browse to the images and click on the **Open** button.
4. The images will be imported and displayed on screen.
5. Continue with imaging on demand.

Note: You will have to manually specify the quantity shipped[717] in the delivery billing module if you wish to apply the per-page scanning fees on imported images (this is not the case when images are scanned directly). The typical procedure would be to write the number of pages on the delivery slip, and then modify the quantity shipped during the periodic review of delivery slips.

9.6.7 Delivery Route

9.6.7.1 Overview (Delivery Route)

The Delivery Route module organizes and streamlines the process of working with multiple deliveries for different addresses.

Available reports

- list of deliveries included on the current delivery route[645]
- delivery history of one vehicle for a specific time period[645]

Fields[640] (see the next section)

Tasks

- Creating a delivery route[641]
- Editing or optimizing a delivery route[642]
- Deleting a delivery route[643]
- Downloading a delivery route on the PDT[644]

Distinctive menu options:

File menu

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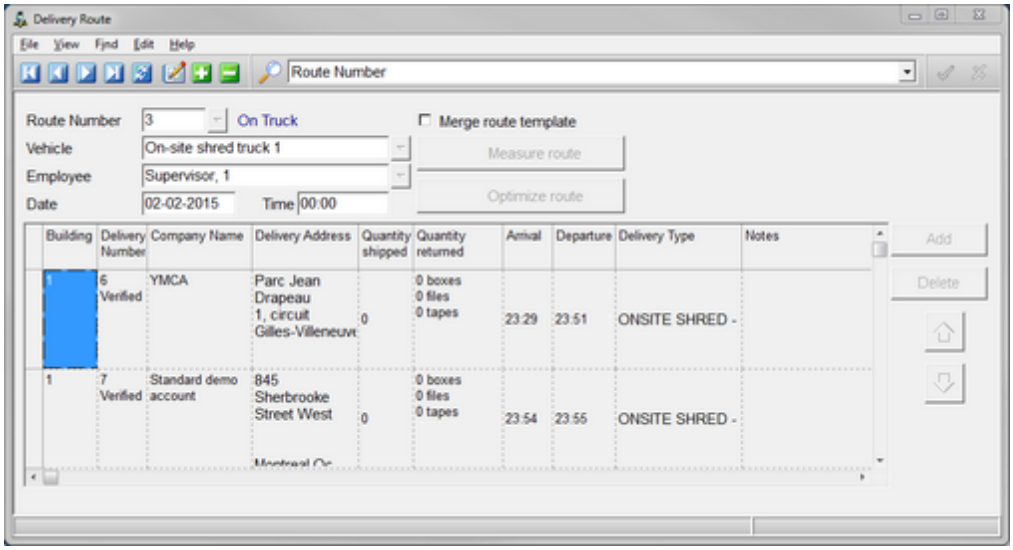
- Print delivery slips of route[643]
- Truck validation[643]
- Download deliveries to PDT[644]
- *** On site shred calendar[644]
- *** Off site shred calendar[644]

View menu
- Notes[645]

Edit menu
- Notes[645]

Module window


Delivery Route
File View Find Edit Help
Route Number
Route Number 3 On Truck
Merge route template
Vehicle On-site shred truck 1
Measure route
Employee Supervisor, 1
Date 02-02-2015 Time 00:00
Optimize route
Building
Delivery Number
Company Name
Delivery Address
Quantity shipped
Quantity returned
Arrival
Departure
Delivery Type
Notes
Add
Delete
1 6 Verified YMCA Parc Jean Drapeau 1, circuit Gilles-Villeneuve 0 0 boxes 0 files 0 tapes 23:29 23:51 ONSITE SHRED -
1 7 Verified Standard demo account 845 Sherbrooke Street West 0 0 boxes 0 files 0 tapes 23:54 23:55 ONSITE SHRED -

9.6.7.2 Fields (Delivery Route)

Route Number
A number identifying the route, assigned sequentially by the system.

Vehicle
The delivery vehicle used on this route, selected from the list defined in the Delivery Vehicle module[348].

Employee
The employee performing the delivery, selected from the list of active record center employees defined in the Employee module[338].

Date and Time
These fields accept the date and start time for the delivery route. The date defaults to the creation date, and the time is optional.

Status
The value of this field goes from "Created" to "On truck", "Delivered", and "Unloaded" as the route is processed.

Merge route template

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A route template specifies a list of delivery addresses and the order in which to service them. You can manage these through the Orders->Delivery Maintenance module, File->Route Templates,[674] but you can also use an existing route as a route template by editing the route, clicking the "Merge route template" check box, and then selecting the delivery route that you wish to merge it with.

Measure route / Optimize route / Undo

Clicking this button uses MapQuest data to provide a measure of the driving time and distance for the route. You must obtain a key and provide full addresses for your delivery stops as well as your record center buildings for this to work properly.

Clicking the **Optimize route** button re-arranges your route stops to suggest an order with lower driving time and distance. Clicking the button a second time (now labeled **Undo**) restores the previous route order.
***

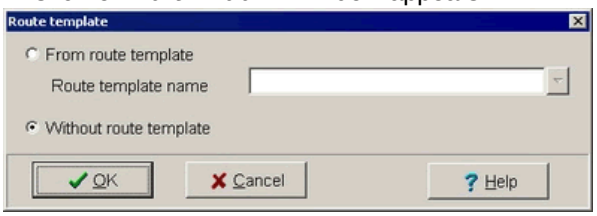
[Delivery list]

This list displays the deliveries, with some details. Using the buttons to the right, it is possible to add, remove, or reorder deliveries on the route. In Edit mode (press **Ctrl-E**), it is possible to manually record the departure and arrival time for each delivery on the route.

9.6.7.3 Creating a delivery route

This tool helps you organize the different trips you will be making daily to your customer's offices, by helping set up an order in the deliveries. The template features will save time by placing the deliveries in the exact delivery address order you set them up (see the Managing route templates[674] topic for a step by step procedure).

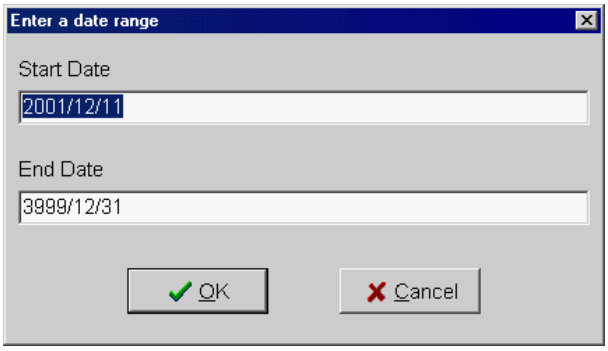
1. Click on **Orders**->**Delivery Route** from the Main window.
2. Click on **Edit**->**Add**. A window appears.



3. Select a vehicle and an employee; enter a date and time for the beginning of deliveries in the appropriate fields.

Perform one of the following operations :

4. To add deliveries on the route, click on the **Add** button up to the blue arrows. A window appears.



5. Select a range of dates to scroll for deliveries and press **OK**. A window opens.

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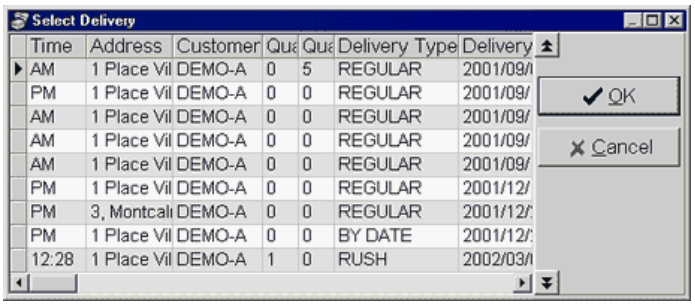

Select Delivery
Time
Address
Customer
Qua
Qua
Delivery Type
Delivery
AM 1 Place Vil DEMO-A 0 5 REGULAR 2001/09/
PM 1 Place Vil DEMO-A 0 0 REGULAR 2001/09/
AM 1 Place Vil DEMO-A 0 0 REGULAR 2001/09/
AM 1 Place Vil DEMO-A 0 0 REGULAR 2001/09/
AM 1 Place Vil DEMO-A 0 0 REGULAR 2001/09/
PM 1 Place Vil DEMO-A 0 0 REGULAR 2001/12/
PM 3, Montcali DEMO-A 0 0 REGULAR 2001/12/
PM 1 Place Vil DEMO-A 0 0 BY DATE 2001/12/
12:28 1 Place Vil DEMO-A 1 0 RUSH 2002/03/
OK
Cancel

Note : This window contains the lists of all the deliveries to be done within the range of dates previously entered.

6. Select the desired deliveries (they will appear highlighted) and press **OK**. The selected deliveries now appear in the module window. This order can be modified by selecting a delivery in the main window and by clicking on the blue arrows to move it.

To remove a delivery from the route, select the desired delivery in the main window and click on the **Delete** button up to the blue arrows.

For details on optimizing your routes, see Editing a delivery route 642

7. Click on the **Accept** button when finished.

9.6.7.4 Editing a delivery route

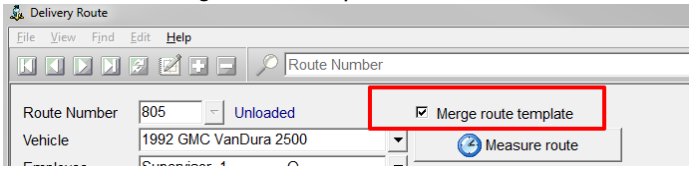
1. Click on **Orders->Delivery Route** from the Main window.
2. Find the desired delivery route and keep it on the screen.
3. Click on **Edit->Edit**.
4. Edit the information in the appropriate fields.
5. To add or remove deliveries, proceed as described in the previous section 641.
6. Click on the **Accept** button to save the changes.

To automatically optimize a route:

1. In the **Orders->Delivery Route** module, navigate to the desired route (if you are not already on it)
2. If you are not in edit mode, click the Edit button or select **Edit->Edit** from the menu.
3. Optionally, click the **Measure Route** button to see the current driving distance and time.
4. Clicking the **Optimize route** button re-arranges your route stops to suggest an order with lower driving time and distance.
5. (Clicking the button a second time (now labeled **Undo**) restores the previous route order.)
6. Press **Ctrl-Enter** or click the green check mark when done.

To merge the stops on the current route into a route template:

- In the **Orders->Delivery Route** module, locate the main route that you wish to start with.
- Press **Ctrl-E** to go into Edit mode.
- Select the Merge route template check-box



- Press **Ctrl-Enter** or click the **Green check mark** to accept.
- From the list of route templates, select the one that you wish to add these addresses to.

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- Repeat the above steps with additional trips if desired.
- Press **Ctrl-Enter** or click the green check mark when done.

For more details on this topic, see Managing route templates[674]

Note: The automated optimization requires a MapQuest key in the system information module, and complete address information for your delivery addresses and record center buildings.

9.6.7.5 Deleting a delivery route

1 Click on **Orders->Delivery Route** from the Main window.
2 Find the desired delivery route and keep it on the screen.
3 Click on **Edit->Delete**. The delivery route is automatically delete in the system and all the deliveries that were included on it will have to be placed on another route.

9.6.7.6 Printing delivery slips for a route

1. Click on **Orders->Delivery Route** from the Main window.
2. Navigate to the desired delivery route.
3. From the menu, select **File->Print delivery slips of route**.

The delivery slips will be printed in the order in which they appear on the route.

9.6.7.7 Validating items for a delivery route

Note: Delivery routes make truck validation much more efficient. Some large record centers that are set up with well-defined shipping areas perform all of their truck validation at once, using a master delivery route that includes all delivery addresses. After all delivery items have been grouped and validated, they then delete this delivery route so that the deliveries become available to go onto the actual delivery routes.

If you are using rcMobile, then this step is replaced by packaging of tapes and files into transport containers[218], and then Truck Validation with rcMobile[222]

1. Open the **Orders->Delivery** module
2. From the menu, select **File ->Truck validation->Download list to PDT**. A message to prepare PDT for download appears.
3. Prepare the PDT[762] to receive information (1-Receive)
4. Perform the validation with PDT

- 3-Processing
- 7-Truck validation
- enter or scan the delivery number
- enter or scan the items' bar codes
- when you are finished press 0 and Enter. For customers that bill by container, the PDT will ask the "Qty shipped"; enter the number of containers on the truck and press Enter

5. In the **Orders->Delivery** module, select **File ->Truck validation->Upload list from PDT**. A "Downloading" message appears.
6. Send the information from the PDT[762]

- 2-Send results
- 7-Truck validation
- select a delivery by entering its number or press 1-All and Enter to upload them all

Note: When all the items have been truck validated, On truck will appear beside the Route number field. The route number will also appear in the delivery module.

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9.6.7.8 Downloading a delivery route for delivery with PDT

The Delivery with PDT[261] parameter in the options section of the Customer->Customer Information module determines whether (outgoing) deliveries are always or never performed with PDT for this customer.

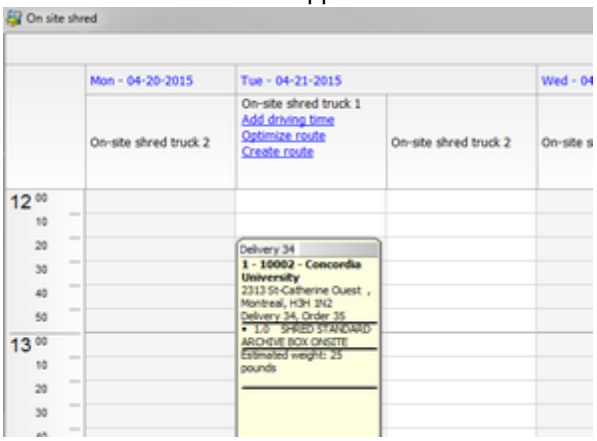
(If a delivery requiring PDT was done without it, it can be "delivered" manually in the Delivery Maintenance[678] module.)

To download deliveries for a route to the PDT:

1. Open the **Orders->Delivery Route** module to the appropriate route (or create a new delivery route[641])
2. From the menu, select **File->Download deliveries to PDT**. A message to prepare the PDT for download will appear.
3. Prepare the PDT for download by placing it in the cradle or plugging in the cable, then pressing **1-Receive** from the main menu.
4. Click the **Ok** button on the computer to transfer the data.

9.6.7.9 Managing shredding routes through the calendar

1. Open the **Orders->Delivery Route** module.
2. From the menu, select **File->On site shred calendar | Off site shred calendar**.
3. Enter the number of weeks to display (larger numbers could take longer on large databases)
4. The selected calendar appears.



To adjust the timing of a delivery or change the vehicle that it is assigned to:

- Click on on the delivery number portion of the schedule item to get the "Move" arrow icon.
- drag and drop the delivery to the desired position on the schedule.

Note: The system protects you against accidentally dragging the service to a different date.

To ensure that you have adequate drive time between stops:

- Click the **Add driving time** link.
- If you have a MapQuest key and the addresses are recognized, the calendar will add time between the deliveries if necessary.

To automatically rearrange the stop order to the calculated optimal order:

- Click the **Add driving time** link.
- If you have a MapQuest key and the addresses are recognized, The stops will be sorted and drive time will be added if necessary.

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To create the route for the date and vehicle:

- At the top of the schedule, click on the **Create Route** link.
- The system prompts, *After creating the route, the route will only be editable from the route module. Continue?* Click **Yes**. to confirm.
- The system prompts, N deliveries will be added to the route. Create route? click **Yes**.
- Select the driver for the route and click **OK**.
- EDCRC confirms that the route has been successfully created, listing the route number. The color of the delivery changes from yellow to green in the calendar.

The route can no longer be edited through the calendar.

9.6.7.10 Viewing or printing report of the current route or delivery history of vehicles

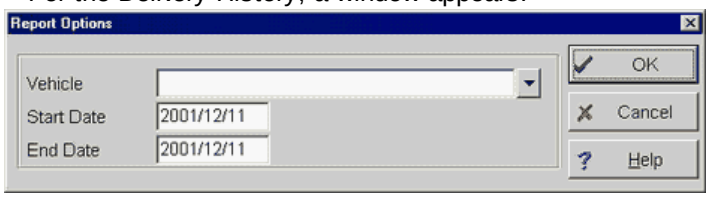
The report of the Current Route lists the delivery addresses and summarizes the number of items to be dropped off and returned at each location. It includes spaces to enter the arrival and departure time for each site, as well as the start and end mileage of the vehicle. This can be useful to drivers and supervisors in planning and managing delivery routes.

The Delivery History report lists similar information, by date, for a range of dates.

1. Open the **Orders->Delivery Route** module.
2. From the menu, select **File->View Report | Print Report->Current Route | Delivery History**.

- For the Current Route, the report will be produced immediately.

- For the Delivery History, a window appears.



- Select the vehicle for which the delivery history is to be produced, enter an range of delivery dates and press **OK.**
- The report will be produced.

9.6.7.11 Editing or viewing delivery route notes

Delivery route notes can be viewed and edited in EDC RC, and will appear above the list of deliveries on the current delivery route[645] report commonly used by drivers.

To view delivery route notes:

1. Open the **Orders->Delivery Route** module to the desired delivery route.
2. From the menu, select **Edit->Notes**.

To view delivery route notes:

1. Open the **Orders->Delivery Route** module to the desired delivery route.
2. From the menu, select **View->Notes**

9.6.8 Return Delivery

9.6.8.1 Overview (Return Delivery)

It is necessary to return every delivery in this Orders->Return Delivery module, to inform EDC RC of any returning items, or to confirm that there are none.

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Available reports

- Return slip for a delivery 657
- Refiling list for a delivery 657
- (Other reports may exist in the Report 501 module)

Fields (None)

Tasks

- Returning a delivery 647
- Adding or removing items from a return 648
- Uploading a return from the PDT 654
- Downloading files to refile with the PDT 656
- Creating or resetting a refile list 656
- Viewing or printing a return slip 657
- Viewing or printing a refile list 657
- Finding the return delivery of an item 658

Distinctive menu options:

File menu

- Return Deliveries 647
- View | Print return slip 657
- View | Print refile list 657
- Create refile list 656
- Reset Refile list 656
- Upload return delivery list from PDT 654
- File refile with PDT 656
- Find return delivery 658
- *** Confirm off site shred delivery

Module window:

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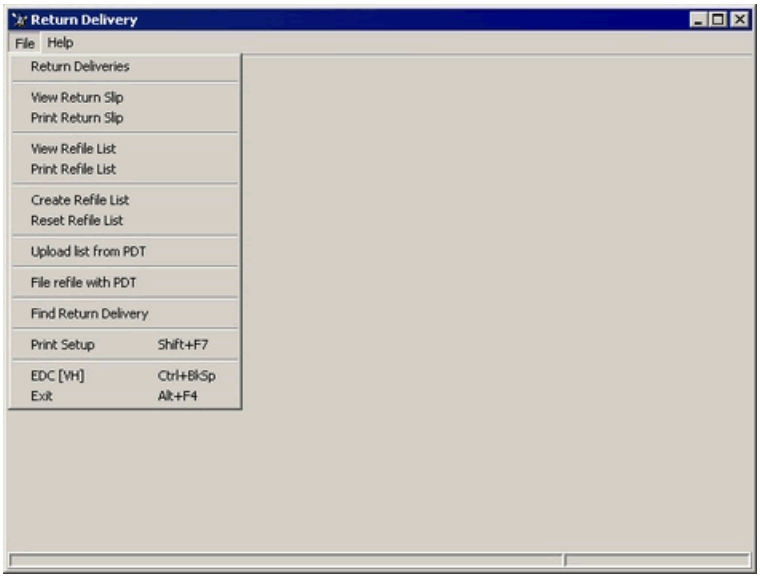
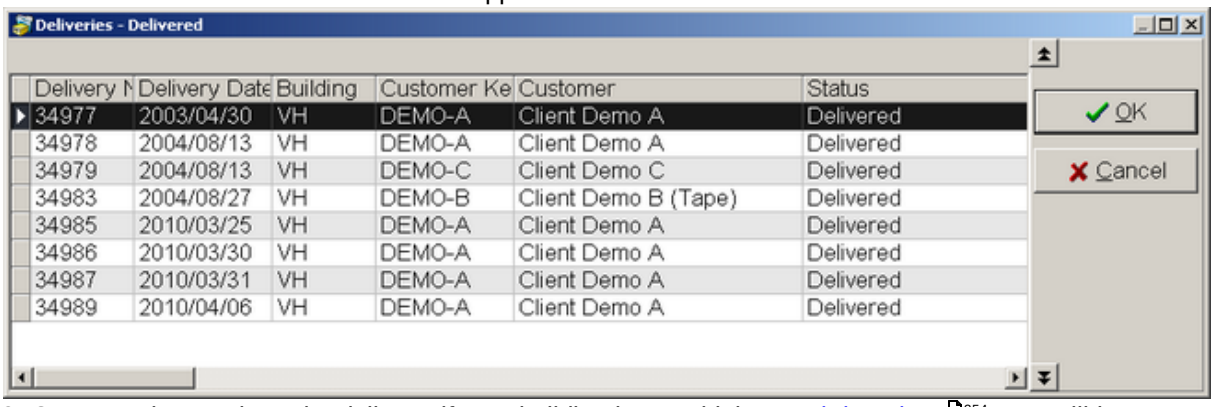


9.6.8.2 Returning a delivery

1. Click on **Orders->Return Delivery** from the Main window. A window appears, prompting for a delivery number.
2. Enter the delivery number in question and press **OK**. If you do not enter a valid delivery number, Lists of deliveries in un-returned states will appear.


Deliveries - Delivered
Delivery N Delivery Date Building Customer Ke Customer Status
34977 2003/04/30 VH DEMO-A Client Demo A Delivered
34978 2004/08/13 VH DEMO-A Client Demo A Delivered
34979 2004/08/13 VH DEMO-C Client Demo C Delivered
34983 2004/08/27 VH DEMO-B Client Demo B (Tape) Delivered
34985 2010/03/25 VH DEMO-A Client Demo A Delivered
34986 2010/03/30 VH DEMO-A Client Demo A Delivered
34987 2010/03/31 VH DEMO-A Client Demo A Delivered
34989 2010/04/06 VH DEMO-A Client Demo A Delivered
OK
Cancel

3. Once you have selected a delivery, if your building has multiple transit locations[354], you will be prompted to select one to return to.
4. Select a transit location and press **OK**. A window is displayed and asks to enter the quantity of boxes that are returned.

Note : The system indicates by default the quantity of return boxes entered on the orders. It can be modified here to reflect the real quantity of boxes picked up at the customer's office.

5. Enter the number of return items and press **OK**. A window appears for you to scan a first item with the computer's bar code scanner.

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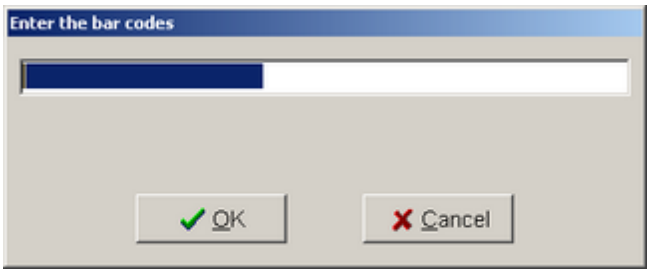
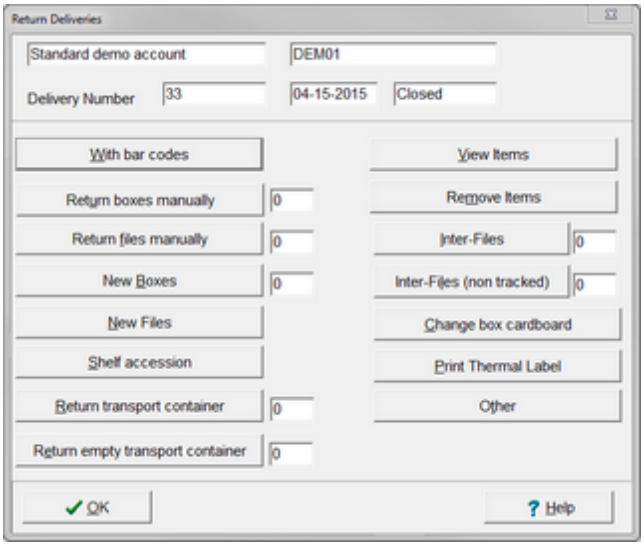
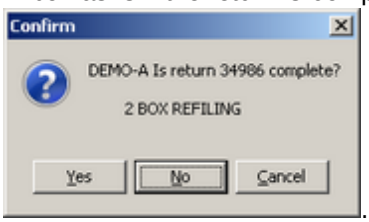


6. Scan each bar coded item. Click on the **Cancel** button when done to access the delivery return options (following window).



7. If required, click the appropriate buttons to add or remove items to or from the return delivery (view next section 648, adding or removing items from a return, for more details). Click **OK** when done. A dialog box asks if the return is complete and provides a summary of the return



.

8. Click on the **No** button if items remain to be added to this return at a later time. Otherwise, click on the **Yes** button to confirm that the return is complete. A dialog box asks "Print Refile List (delivery number)?".
9. If a refile list is to be printed, click **Yes**, otherwise click **No** (which is the default). A dialog box asks if another delivery must be returned.
10. Click on the **Yes** button to return another delivery or click on the **No** button to go back in the main window of the module and have access to the other options.

9.6.8.3 Adding or removing items from a return

The following operations are available while performing a return delivery (see the previous section) 647.

Returning a box by reading bar codes

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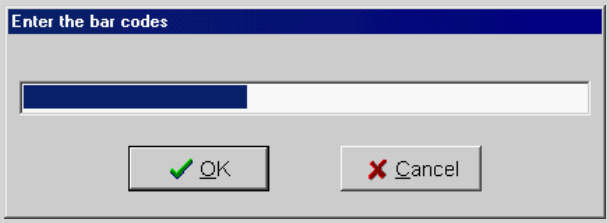
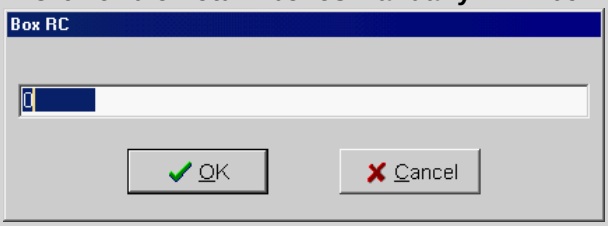
1. Click on the **With bar** codes button. A window appears.



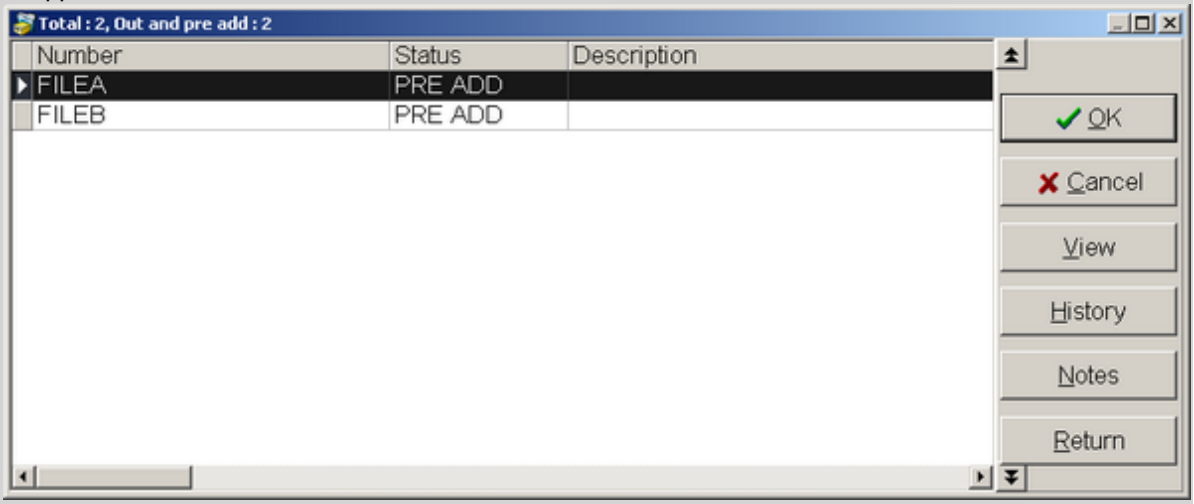
2. Read a box with the bar code reader attached to the workstation or enter it manually and press **OK**. Sometimes, a message appears and indicates that the box contains inventoried files. A window follows that message and allows to return the files in question.
3. Read or enter the bar code of the first file and press **OK**. Repeat the operation as many times as needed.

Manually returning a box

1. Click on the **Return boxes manually**. A window appears.



2. Enter the RC number of the box and press **OK**.
3. If the box contains inventoried files and the file in box tracking option[248] is turned on, a window appears.



4. Select the files being returned in the box and click the **Return** button.
5. Press the **OK** button.
6. If a message indicates that files are missing, double-check the box for them, then follow your record center's procedures for handling files missing on a return.

Adding a new box to the inventory

1. Click on the **New Boxes** button. A dialog box appears.

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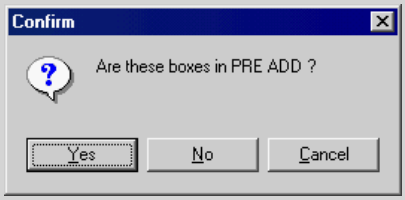
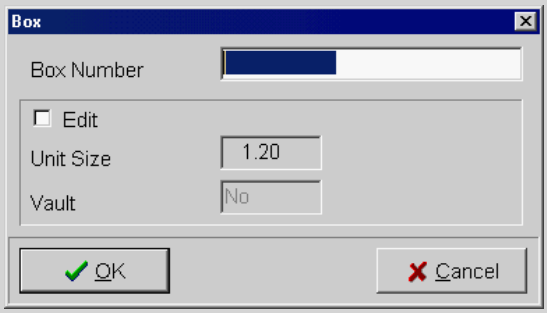


2. Click on the **Yes** button if the boxes are already in PRE ADD in the inventory, or click on the **No** button if it is not so. For boxes already entered in the system, the following window appears instantly. For boxes that are not inventoried, two windows appear before this window and allows to choose a department and record series for the new boxes.

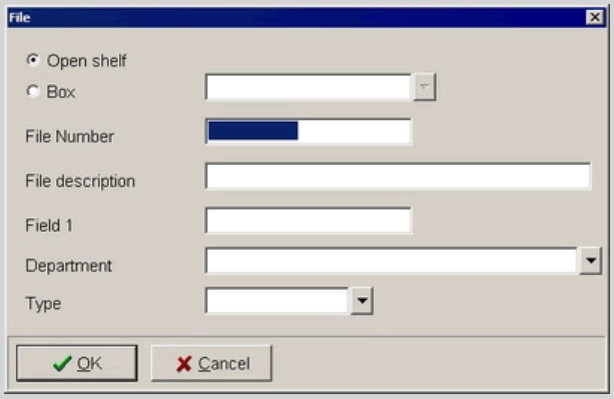


3. Enter the box number and press **OK**.

Note : It is possible to check off the Edit option, in order to be able to change the box volume and to specify if it must be stored in the vault. Otherwise, boxes automatically take the size of the first location of fixed size that they are moved to.

*Adding a new file to the inventory

1. Click on the **New Files** button. A window appears.



2. Specify whether the file is to be stored in an Open shelf location or a Box.

- For the **open shelf file**, enter a number,a description, a field 1 (optional), a department and a type for the file and press **OK**. As soon as the operation is accepted the shelf file becomes IN and may be viewed in the File module.
- For the **in-box file**, choose a box by clicking on the drop-down button at the right of the field and select a box in the list (it will appear highlighted). Enter a number, a description, a field (optional), a

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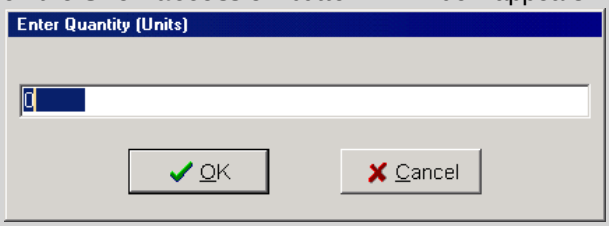
department and a type for the file and press OK. As soon as the operation is accepted the shelf file becomes IN and may be viewed in the File module.

Adding an open shelf accession

1. Click on the **Shelf accession** button. A window appears.

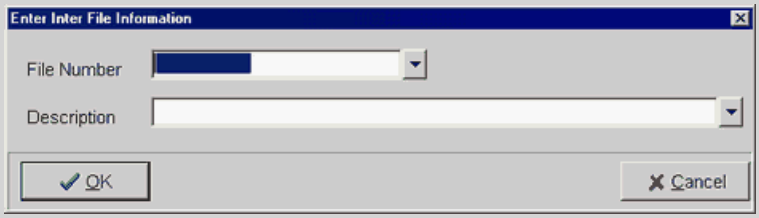


2. Enter the desired shelf accession quantity and press **OK**. This quantity of files will be added to the return items on the delivery for invoicing.

Inter-filing documents into inventoried files

Customers may return documents that belong within existing inventoried files, for example if a file was ordered and returned, but some of the documents from the file were initially kept at the customer site.

1. Click on the **Inter-Files** button. A window appears.

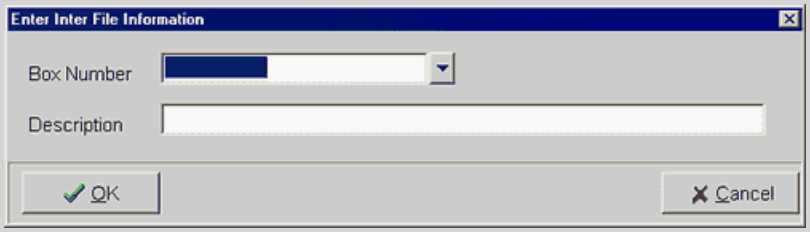


2. Enter the number or the description of the file where the sheets are inserted and press **OK**. Repeat the operation as many times as needed for the same file or for any other file and click on the **Cancel** button when finished.

Note : The files must be IN. The inserted sheets will be displayed on the return slip as "Correspondence" and "Inter-filing". Since they lack bar codes, these items must be verified manually 659.

Inter-filing documents into non-inventoried files

1. Click on the **Inter-Files (non tracked) button**. A window appears.



2. Enter the box number where the non track file is stored and the description of the file, and press **OK**. Repeat the operation to insert other pieces into the same box or into any other box.

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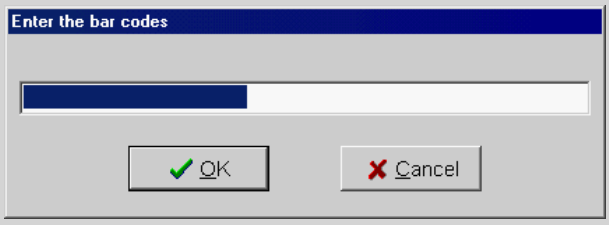
Note : The boxes must be IN. The inserted sheets will be displayed on the return slip as "Correspondence" and "Inter-filing". Since they lack bar codes, these items must be verified manually 659.

Changing a cardboard box

A cardboard box change can also be performed in the Box module and in the Delivery Billing 718 module. For more information on how this change can be billed to customers, please refer to the Changing the cardboard of a box 458 topic. When a cardboard is changed in the current module, the retrieval rate is not applied.

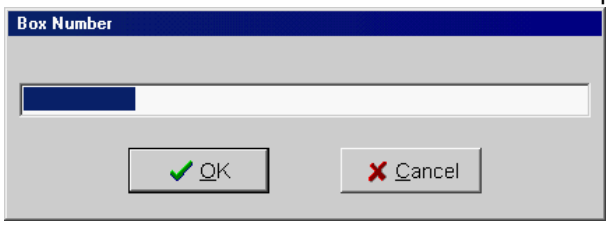
1. Click on the **Change box cardboard** button. A window appears.



2. Scan or enter the bar code of the first box and press **OK**. The system automatically reprints the label for the new box. Depending on how often the box was handled, the customer may also be charged for a box sale and a reboxing charge.
3. If necessary, scan another box to re-box. Otherwise, click on the **Cancel** button to end the operation.

Printing a bar code label for a box

1 Click on the Print Thermal Label button. A window appears.



2 Enter the number of the desired box and press OK. The label is automatically printed on the default thermal printer.

Note : This operation can also be performed to reprint damaged labels for boxes already in inventory.

Other (Add labour, Add notes, Batch addition of boxes)

To add a labour charge:

1. Click on the **Other** button.
2. When adding labor, this window appears :

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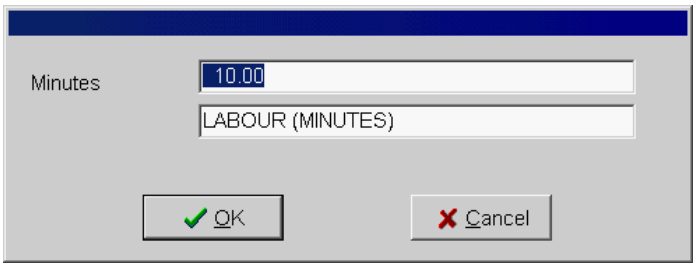
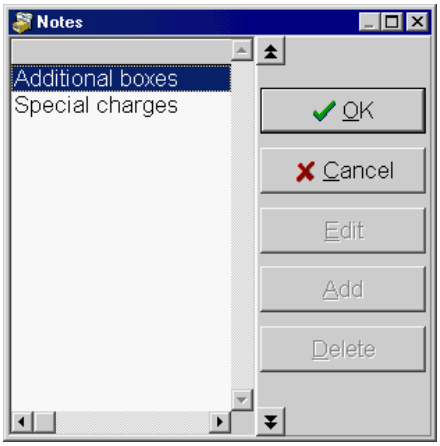


3. Enter the desired quantity of labor minutes and press **OK**.

Note : When the customer is billed by department or charge back (settings of the Customer Information module), a window appears previously and asks to enter a department or charge code to be billed for the additional labor.

4. When you had a charge, you will automatically be prompted to select a from a list of pre-determined delivery notes[377] to add for the charges. These will appear on the delivery summary invoice attachment.



5. Select the desired notes and press **OK**. A report's window appears, containing the text of the notes.
6. Edit them if necessary and press **OK** when finished.

Note: You can add notes without the labour charge by clicking **other->add notes**.

Batch addition of boxes

This operation is similar to the batch addition of boxes through the box module[453], except that delivery and accession charges will be captured.

1. Click on the Other button, and select Batch addition.
2. Place an 'x' beside the fields to be entered (or double-entered) in the batch addition process, then click Okay.
3. Specify the Department and document Type by selecting from the list or typing into the field, then click Okay.
4. If the boxes have preprinted labels, click Yes, otherwise click No.

If yes

- A dialog box asks "Would you like to size the boxes?"
- If you click Yes, you will be prompted to assign a size or select a box type, then click Okay.
- Enter the bar code of the box by scanning it with the wedge scanner, or by typing the bar code and pressing Enter.

If No

- Assign a size or select a box type, then click Okay. A label will be printed after each box.

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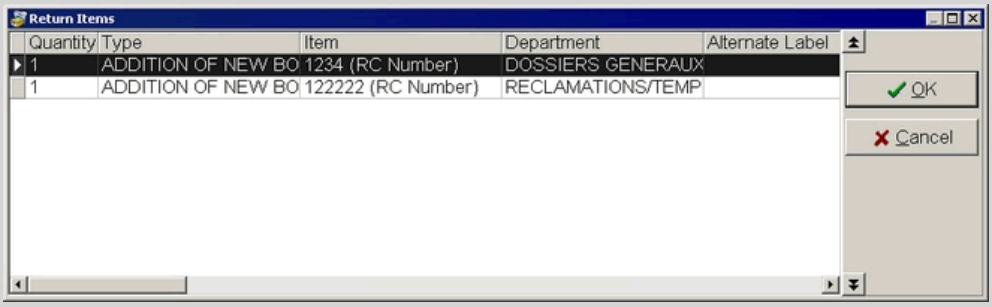
5. Enter values for the selected fields, and repeat until all boxes of this size, department, and record series have been entered.
6. When done, click Cancel to return to the return deliveries options window.

Displaying the list of the returned items

1. Click on the **View Items** button. A window appears.



2. Press **OK** to end the operation.

Cancelling the return of items

1. Click on the **Remove Items** button. A list of the items appears.
2. Highlight the desired items and press **OK**.

Returning transport containers or empty transport containers

Adjusting these will affect the transport container state and add the history of it being returned on the delivery number and delivery date in question. The quantity of transport containers (not empty) may also affect delivery handling billing for accounts billed by container.

To a transport container return:
1. Click the **Return transport container** | **Return empty transport container** button.
2. Scan the bar code for each transport container to add to the return.

If you need to remove a transport container, use the Remove Items button.

9.6.8.4 Uploading a return from the PDT

Basic returns may also be performed on the PDT and then uploaded. (see the section Returning or adding items with the PDT[179]). To upload this return:

1. Click on **Orders->Return Delivery** from the Main window.
2. Prepare the PDT to send the data and click on **File->Upload** list from PDT.
3. When the data transfer is done, a dialog box appears.

- If there is an error in the delivery number, a window appears

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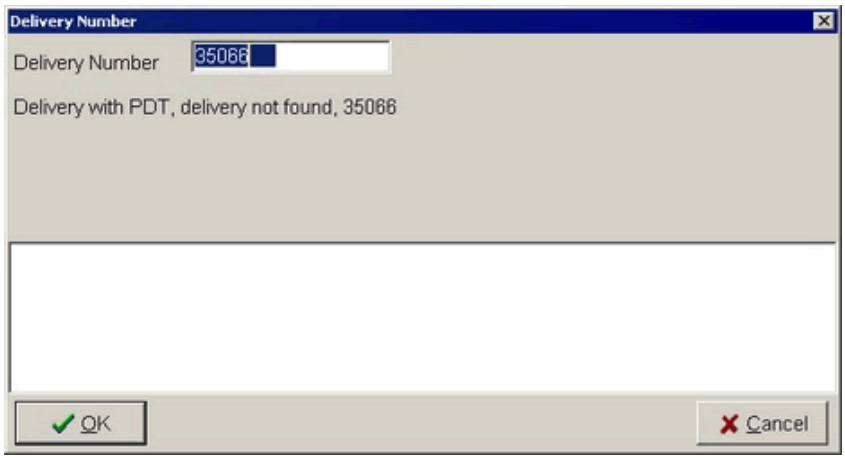
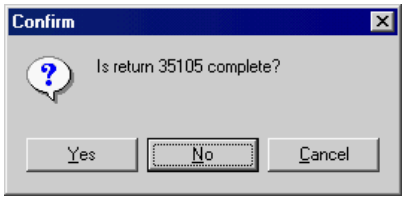


4. Enter the right delivery number and press **OK**.

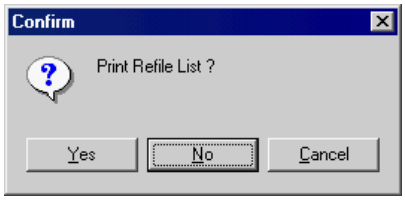
If the data uploaded from the PDT indicates to the system that all the items have been delivered or returned and scanned properly



Note : When uploading returned boxes with inventoried files that need to be scanned, a report appears and displays the list of these boxes. The user must then print the report, scan the files in question with the PDT and restart the current operation. He can also return the files manually with the usual way (see the section "Adding or removing items from a return[648] ").

5. If the return is not complete, click on the **No** button. The system will assume that other items need to be returned. This can be done manually in the current module (see the section "Adding or removing items from a return[648] ") or with the PDT (see the section "Returning or adding items with the PDT[179] ").

6. If the return is complete, click on the **Yes** button. Unless there are files that must be scanned in some boxes (a message will appear if that case arises), the delivery is automatically marked as "Returned" and the following dialog box appears.



7. Click on the **Yes** button or on the **No** button, according to the needs. When clicking on Yes, it starts the printing of the refile list and return slip for the delivery in question. The items can then be refiled with the PDT (see the section "Refiling items with the PDT[182]") and also manually, with the creation of a refile list in EDC (see the section "Creating or resetting a refile list[656]").

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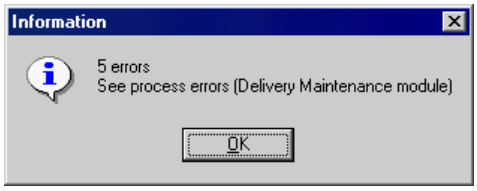
9.6.8.5 Downloading files to refile with the PDT

For efficiency, record centers frequently move returned files to bins labeled as file transit locations, until it is convenient to refile them in batches.

To prepare a refile list using the PDT:

1. On the PDT, select **3-Processing->5-File refile**, then scan the file bar codes (see Refiling items with the PDT 182 for details)
2. Open the **Orders->Return Delivery** module, and select **File->File refile with PDT**. A window indicates that EDC RC is downloading information.
3. Connect the PDT to the system via cradle or cable, and press the Enter (ENT) button on the PDT to send the file bar codes and receive the corresponding refile list with boxes and locations.

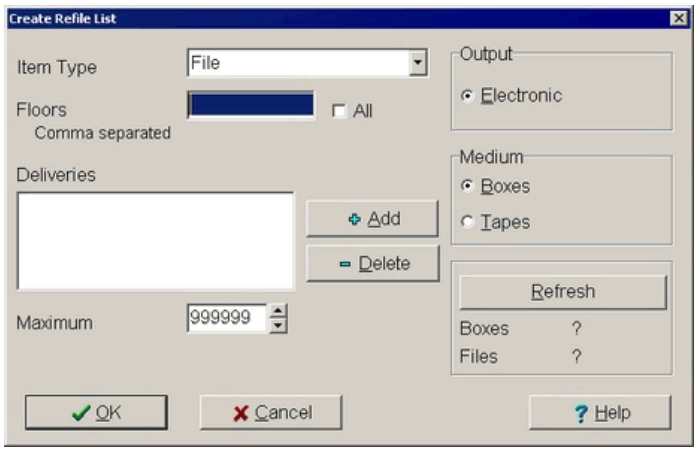
If errors occur, these should be handles and soon as possible and marked as reconciled 673 in the Orders->Delivery Maintenance module.



9.6.8.6 Creating or resetting a refile list

Creating a refile list

1 Click on **Orders**->**Return Delivery** from the Main window.
2 Click on **File**->**Create Refile List**. A window appears.



Item Type : this field allows to select the record series to include on the refiling list (Box | File | Open shelf file.)

Floors, comma separated : this option is only viewable when the "File" or "Open Shelf File" values has been chosen previously. It allows to determine on which floors at the record center the refile can be done. This option is a deciding factor when the system scrolls the available locations.

Deliveries : by clicking on the **Add** and **Delete** buttons, it is possible to establish a list of the deliveries that will be included on the refile list.

Maximum : this field allows to enter the maximum quantity of items that can be added on the refile list. When the quantity of items to be returned for the selected deliveries is more important than the

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maximum, the system will stop to add items on the list. It will then be necessary to create another list to complete the refiling.

Output : indicates if the list will be electronically produced (downloaded to the PDT[871]) or printed on paper.

Medium : for refile lists that only include boxes, it allows to specify if these boxes contain files or are magnetic tapes (box is used as tape). This option is very important since boxes and tapes do not have the same volume, are not stored in the same conditions and may not be refiled in the same locations.

Refresh : indicates how many boxes, files or tapes have to be refiled, in accordance with the parameters previously selected. These quantities can change if another user is presently returning other documents on some of these deliveries so that it will be necessary to click on the **Refresh** button to guaranty that all the related items will be included on the refile list.

3 Enter the desired parameters in the appropriate fields and press **OK** to send the list. A message prompts you to prepare the PDT. Do as prompted and press **OK**.

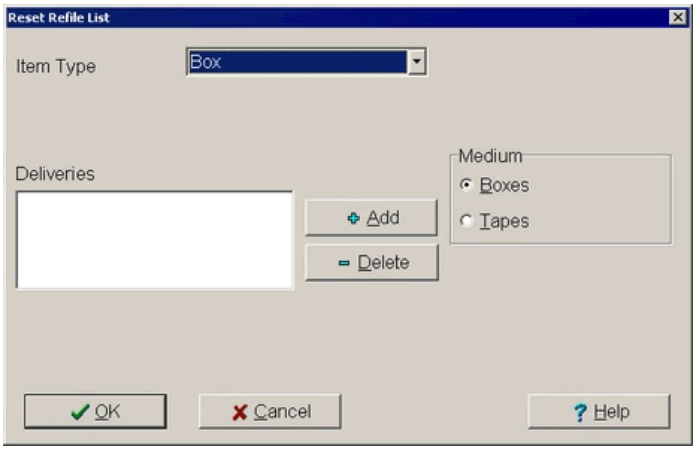
4 Proceed to the refiling[182] of the items and verify the result in the Return Verification[658] module.

Resetting a refile list

This operation is used when a refile list has been created, but has to be reset for some reason.

1 Click on **Orders**->**Return Delivery** from the Main window.

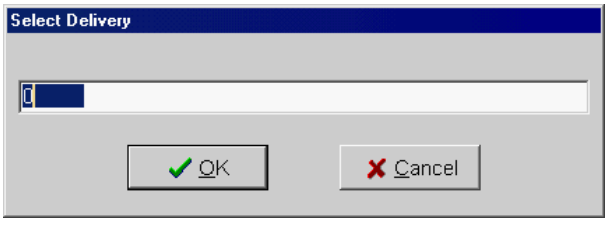
2 Click on **File**->**Reset Refile List**. A window appears.



3 Enter the desired parameters in the appropriate fields (see the previous operation for more details) and press **OK**.

9.6.8.7 Viewing or printing the return slip and the refile list for a delivery

1 Click on **Orders**->**Return Delivery** from the Main window. A window appears instantly.



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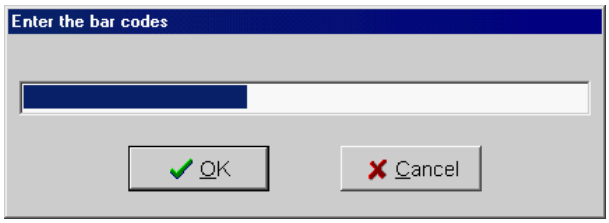
2 Since a return does not have to be returned, click on the **Cancel**, in order to have access to the other options of the module.
3 Click on **File**->**View Return Slip**|**Print Return Slip**|**View Refile List**|**Print Refile List**. The window opened in **1** appears again.
4 Enter the desired delivery number and press **OK**. The chosen slip or list is automatically produced.

9.6.8.8 Finding the return delivery of an item

This operation can be useful in some extreme situations. For example, a document was missed when refiling delivery items and the record center lost some information (ex: the number of the return it belongs to). The current module can help to track the return and to refile the document properly.

1 Click on **Orders**->**Return Delivery** from the Main window. A delivery choice window appears.
2 In order to have access to the other module's options click on the **Cancel** button.
3 Click on **File**->**Find Return Delivery**. A window appears.



4 Enter the bar code of the document and press **OK**. A message box appears and indicates the delivery number and date when the item was returned.
5 When the information has been successfully consulted, press **OK**.

9.6.9 Return Verification

9.6.9.1 Overview (Return Verification)

The return verification essentially allows to guaranty that inventoried or non track files are refiled in the right box. It is possible to proceed by delivery or by using the out cards (an out card is inserted in the box when a file goes out of the record center - the File Out card [258]option has to be set to yes in the Customer Information module).

Available reports

- list of returns that are not verified
- list of items that are not verified

Fields (None)

Tasks

- Manually verifying returns [659]
- Uploading refile results from the PDT [660]
- Uploading a move list from the PDT [660]
- Viewing or printing returns that are not verified [660]

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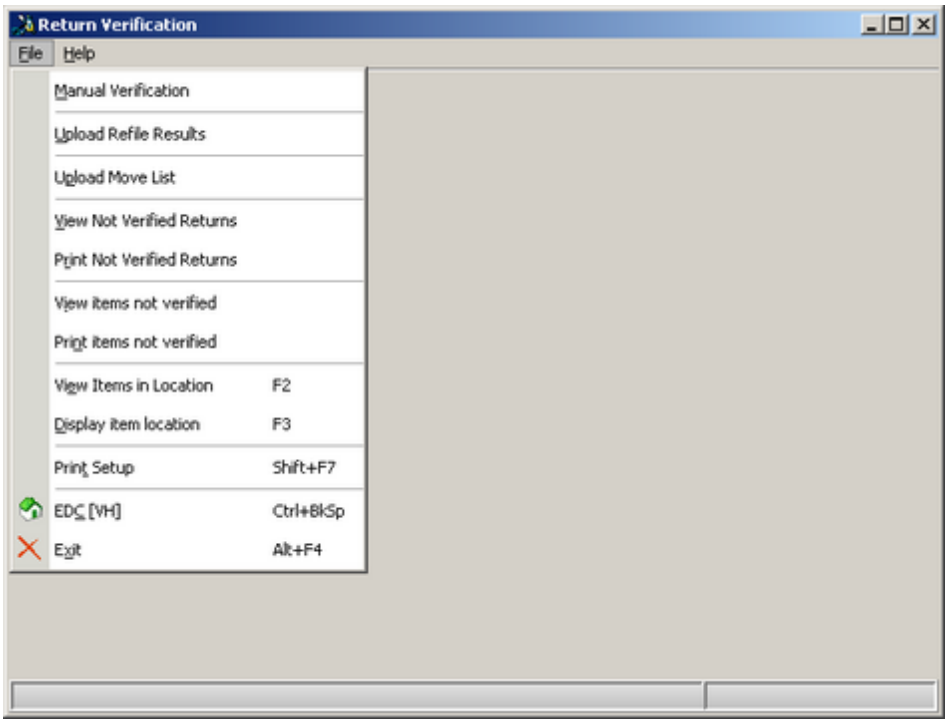
- Viewing or printing items that are not verified 660

Distinctive menu options:

File menu
- Manual verification 659
- Upload refile results 660
- Upload move list 660
- View | Print not verified returns 660
- View | Print items not verified 660
- View items in location 660
- Display item location 661

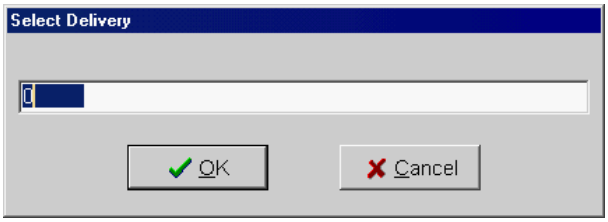
Module window:



9.6.9.2 Manually verifying returns

This operation allows to manually verify the delivery items whose bar code labels cannot be read (labels that come unfixed, lost, damaged).

1 Click on **Orders**->**Return Verification** from the Main window.
2 Click on **File**->**Manual Verification**. A window appears.



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3 Enter a delivery number and press **OK**. A new window opens and indicates all the return items included on that delivery.
4 Select an item (it will appear highlighted) and click on the **Verify** button. The item is automatically considered as being verified and properly returned in the system.

Note : The "Verified" mention appears in front of the item previously selected.

5 Repeat the previous operation as many times as desired and press **OK** when finished. A message will appear to indicate how many items are still not verified on this delivery, should the occasion arise.

9.6.9.3 Uploading refile results from the PDT

This operation allows to upload, to a workstation, the refiling results of items processed with the PDT.

1 Click on **Orders**->**Return Verification** from the Main window.
2 Prepare the PDT to send the data (see the section "Refiling items with the PDT[182] ") and click on **File**->**Upload Refile Results**.
3 When the data transfer is done, the state and location of the items are updated in the Box and File module. When there are process errors, a message appears. These errors can be reconciled in the Delivery Maintenance module (see Reconciling process errors[673]).

9.6.9.4 Uploading a move list from the PDT

This operation allows to upload the items moved directly with the PDT or included in an internal transfer list and processed with the PDT.

1 Click on **Orders**->**Return Verification** from the Main window.
2 Prepare the PDT to send the data (see the section "Moving or removing items with the PDT[766] ") and click on **File**->**Upload Move List**.
3 When the data transfer is done, a report appears and displays the process errors. (see Reconciling process errors[673]).The history and location of the items are updated.

9.6.9.5 Viewing or printing returns and items that are not verified

Viewing or printing the list of not verified returns

1 Click on **Orders**->**Return Verification** from the Main window.
2 Click on **File**->**View Not Verified Returns**|**Print Not Verified Returns**. A window appears and asks to enter an interval of delivery dates.
3 Enter the desired interval and press **OK**. The report is automatically printed or displayed.

Viewing or printing the list of not verified items

1 Click on **Orders**->**Return Verification** from the Main window.
2 Click on **File**->**View items not verified**|**Print items not verified.** A window appears and asks to enter an interval of deliveries.
3 Enter the desired interval and press **OK**. The report is automatically printed or displayed.

9.6.9.6 Listing items in a location

To view a list of items that are currently recorded in a location:

1. From the menu of the **Orders->Return verification** module, select **File->View Items in Location**. A window appears.

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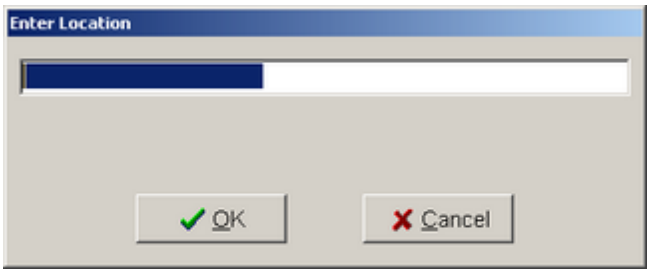


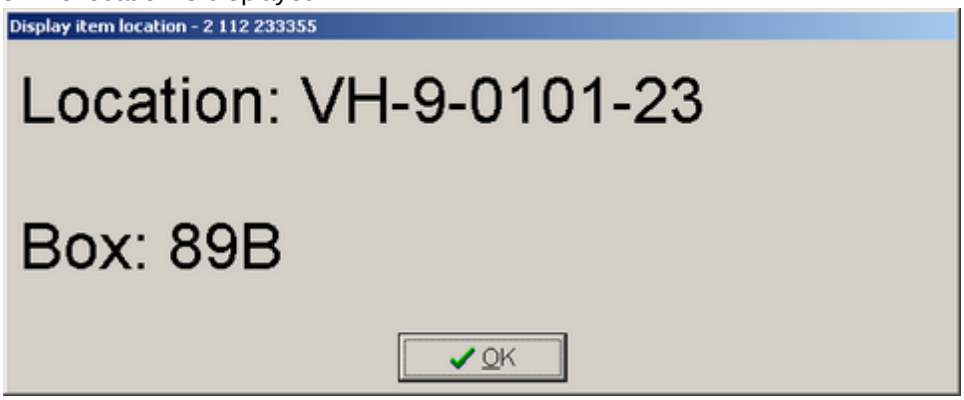
2. Enter the location by scanning a location bar code, or by manually entering it and clicking **Ok**.
3. A report lists the items assigned in the system to this location.

Note: It is easy to accidentally miss scanning a box. When refilling more than a few boxes, it is good practice to scan manageable batches of boxes to a holding location identified by a bar code on a small traffic cone. Once this batch of items have been refilled, it is easy to confirmed that no items were missed, by scanning the cone to verify that the location is empty.

9.6.9.7 Displaying the location of a scanned item

To quickly view the location of an item:

1. From menu of the **Orders->Return Verification** module, press **F3** or select **File->display item location**.
2. Scan or manually enter the bar code.
3. The location is displayed.



9.6.10 Non Track File

9.6.10.1 Overview (Non Track File)

When a customer orders a file that has not been previously inventoried, a temporary record is created. If the file is found, it is automatically inventoried as a permanent file. If the file is not found, it is excluded, and the non-track file is recorded in this module.

Available reports

- list of all non track files
- list of non track files for one customer)

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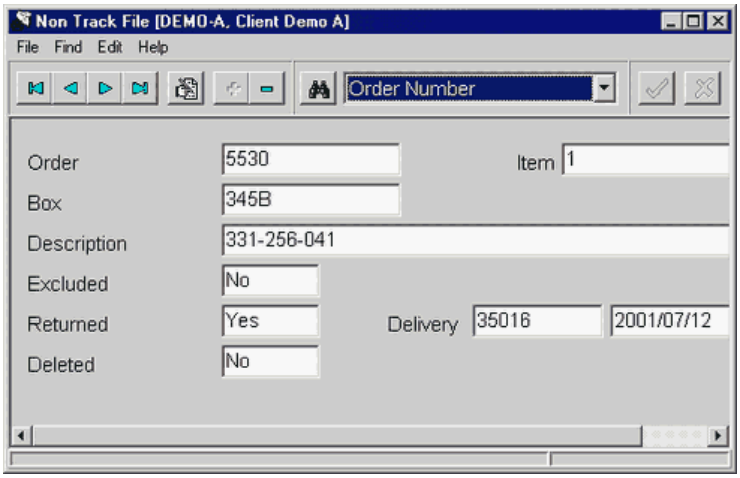
Fields[662] (see the next section)

Tasks

- Removing a non track file from inventory[663]
- Viewing or printing a list of all the non track files[663]

Distinctive menu options: (None)

Module window:



9.6.10.2 Fields (Non Track File)

Order
This field indicates the number of the order on which the file was placed.

Item
This number identifies the position of the file on the order.

Box
It is the number of the box where the file was searched.

Description
This is the description entered in the order to find the file.

(Excluded)
When this field indicates "Yes" it means that the file has not been found; so that the file has been excluded from the order and has not been sent to the customer. (This will is "Yes" for all new files.)

(Returned)
When this field indicates "Yes" it means that the file has been found (the previous field may indicate "No"); so that the file has been sent to the customer and has been returned to the record center.

(Deleted)
When this field indicates "Yes" it means that the file will never come back to the record center and has been deleted from the inventory.

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(Delivery)
This field indicates on which delivery the file was sent to the customer, should that occasion arise.

(Delivery Date)
This field indicates the date when the file was delivered.

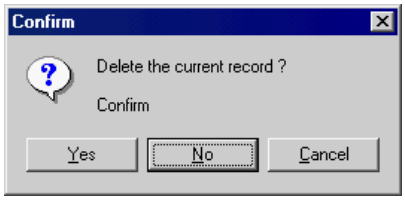
Note: Fields in brackets are largely obsolete due to changes in EDC RC.

9.6.10.3 Removing a non track file from inventory

This operation is performed when the record center is advised that a non track file will never come back to the storage area. It is then necessary to remove the out card from the box that contained the file and also to delete the file from the system.

Note: this applies to records created with earlier versions of EDC RC

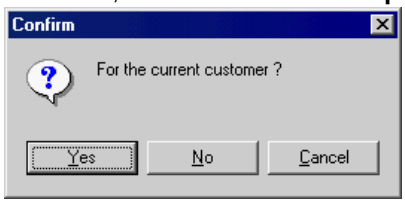
1. Click on **Orders->Non Track File** from the Main window.
2. Find the file and click on **Edit->Delete**. A dialog box appears.



3. Click **Yes** to confirm the deletion. The content of the Deleted field becomes "Yes".

9.6.10.4 Viewing or printing the list of non track files

1. Open the **Orders->Non Track File** module.
2. From the menu, select **File->View Report|Print Report**. A dialog box appears.



3. Click **Yes** to produce a report for a specific customer or click **No** to include all customers.

9.6.11 Shelf Non Track File

9.6.11.1 Overview (Shelf Non Track File)

Sometimes, non track files are stored on open shelves instead of boxes. This module presents information about auto inventoried files that were ordered but not found. Information includes the order number, the position of the file on the order and the description which has been entered to find the file.

Available reports

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- list of all non track files on open shelf

Fields[664] (see the next section)

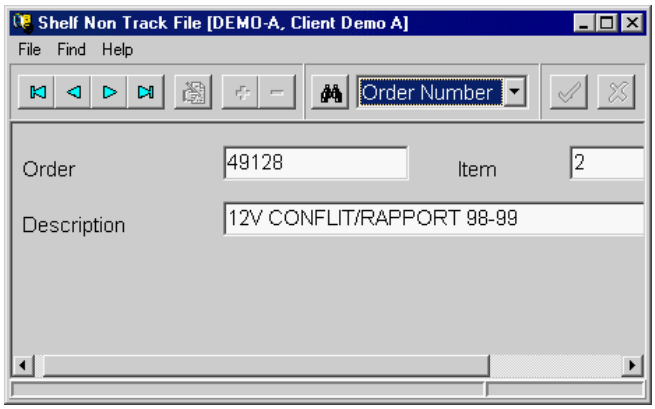
- None. (See the Report[501] module)

Tasks

- Viewing or printing the list of all non track files on open shelf[664]

Distinctive menu options: (none)

Module window:



9.6.11.2 Fields (Shelf Non Track File)

Order

This field indicates the order number of the file.

Item

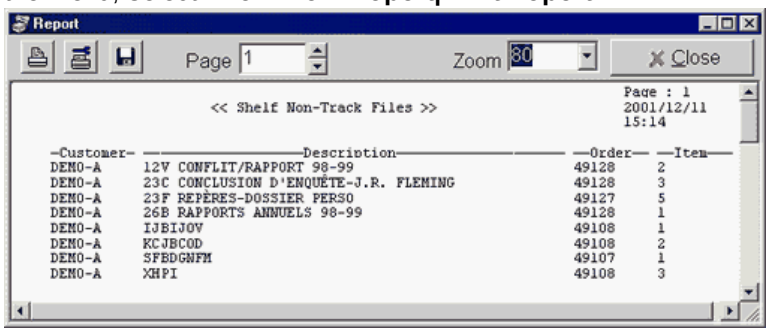
This number identifies the position of the file on the order.

Description

This is the description entered in the order to find the file.

9.6.11.3 Viewing or printing the list of all non track files on open shelf

1. Open the **Orders->Shelf Non Track File** module
2. From the menu, select **File->View Report|Print Report**.



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9.6.12 Delivery Imaging

9.6.12.1 Overview (Delivery Imaging)

Delivery slips provide an important record of the delivery, including the time that it is occurred, the name and signature of recipient, and their initials acknowledging any change to the delivery, such as changes in the number of boxes returned, and any additional labor charges.

The delivery imaging module enables record centers to scan these slips and automatically associate them with the correct delivery, for reference by the record center. Customers can also access the slips for their own deliveries over ActiveWeb.

Available reports

- Deliveries not imaged (for date range)

Tasks

- Scanning delivery and return slips 666
- Importing delivery and return slips 667
- Finding a delivery image 668
- Printing delivery images 668
- Exporting a delivery image 668
- Sending delivery images by Email 669
- Copying the current delivery image 669
- Editing the current delivery image 670

Distinctive menu options:

File menu

- Scan 666
- Select Scanner
- View deliveries not imaged 667
- Viewing returns not imaged 667
- Import 667
- Export 668
- E-mail 668

Edit menu

- Copy Image 669

View menu

- (various standard options) 669

Image menu

- Rotate 670
- Negative 670

Module window

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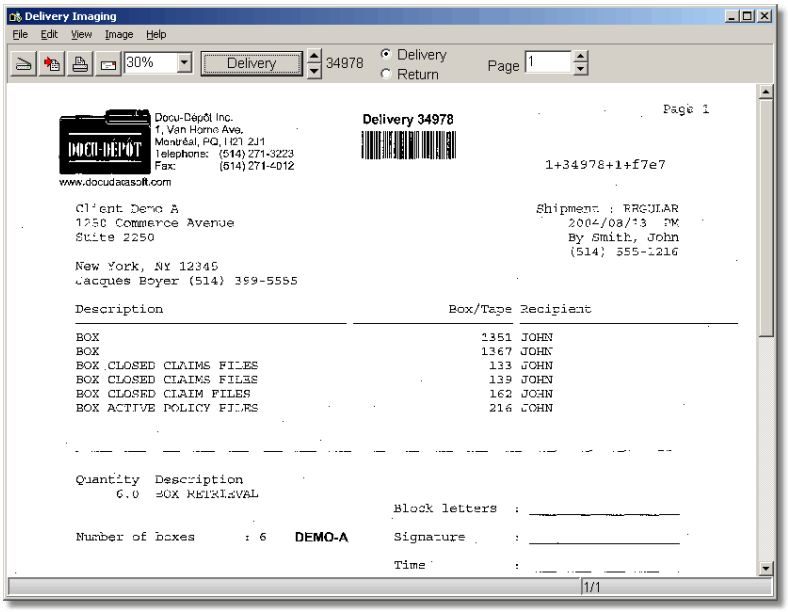


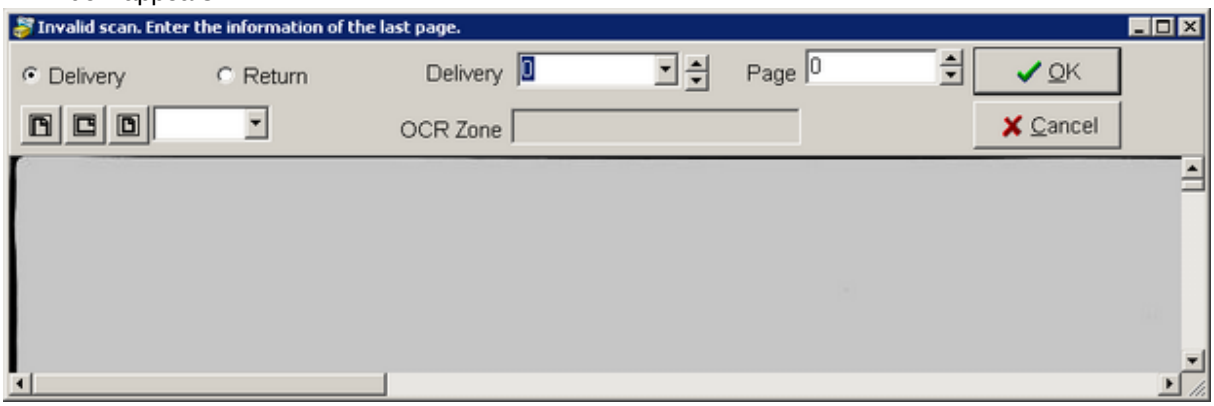
9.6.12.2 Scanning delivery and return slips

1. Click on **Orders->Delivery Imaging** from the Main window.
2. Click on **File->Scan**. The scanner interface window appears. This will vary depending on your scanner.
3. Perform the scanning in accordance with the scanner used.

The system automatically recognizes the codes present on every slip (these codes are used to associate a delivery number to each slip).

Note:

4. If When the OCR fails (because of damaged slips, slips not inserted properly in the scanner, etc), a window appears.



5. Check off the option Delivery or Return, according to the scanned slip. Enter a delivery number and a page number (some slips can have many pages),and press **OK**. (Pressing the '+' or '-' buttons on the number pad will increase or decrease the page number. Clicking on the drop-down to the right of the delivery number will bring up a keypad that you can use to select the number in case your keyboard is not accessible.)

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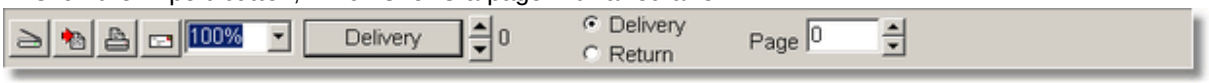
6. The images are saved in the default image directory of the system (settings defined in the System Information module).

It will be possible to consult the delivery images[667] in EDC RC, through ActiveFile, or via ActiveWeb.

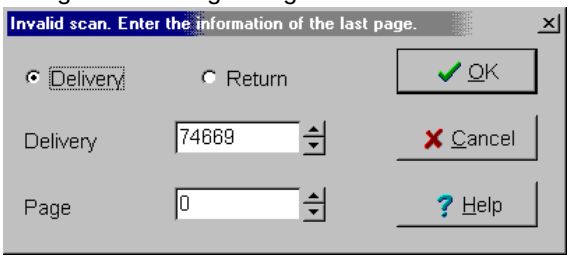
9.6.12.3 Importing delivery and return slips

In addition to scanning delivery and return slip images[666] into the delivery imaging module, it is also possible to import them from TIFF format.

1. From the Main window, open the **Orders->Delivery imaging** module.
2. Click the Import button, which shows a page with a red arrow.



3. Navigate to the file that you wish to import, then click **open**.
4. If the slips are recognize, they will be imported automatically and you will be returned to the main screen of the delivery imaging module. If they are not recognized, you will be prompted to identify them, using the following dialogue box:



5. Identify the slip, then click **Okay**.

9.6.12.4 Viewing a list of deliveries or returns that have not been imaged

To identify deliveries or returns that do not yet have an imaged delivery slip:

1. Open the Orders->Delivery Imaging[665] module.
2. From the menu, select **File->View deliveries not imaged | View returns not imaged**.
3. A window prompts you for a range of delivery dates. Enter a **From** date and a **To** date, and click **OK**.
4. The list of deliveries or returns not imaged for those dates appears.

9.6.12.5 Finding a delivery image

1 Click on **Orders->Delivery Imaging** from the Main window.
2 Click on the **Delivery** button from the button bar. A window appears.

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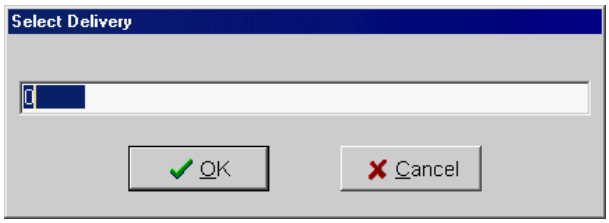

3 Enter the searched delivery number and press **OK**. If the slips for this delivery have been scanned properly, an image is supposed to be displayed on the screen. The delivery number in question will appear beside the Delivery button. It is then possible to perform some operations from the button bar :

- Click on the choice buttons located to the right of Page, in order to display the other images for this delivery, should the occasion arise.
- Check off the option Delivery or Return, in order to view respectively the delivery or return slips.
- Click on the choice buttons located to the right of the Delivery button, in order to scroll slips for other deliveries.

9.6.12.6 Printing delivery images

This operation allows to print all the pages for the current slip.

1 Click on **Orders**->**Delivery Imaging** from the Main window.
2 Find the desired image[667], keep it on the screen and click on **File**->**Print**. A window appears and asks to enter an interval of pages.
3 Enter the desired interval and press **OK**. The images will be automatically printed from the default printer.

Note : The parameters for printing can be modified by clicking on **File**->**Print Setup** from the current module.

9.6.12.7 Exporting a delivery image

This operation allows to export only the current image.

1 Click on **Orders**->**Delivery Imaging** from the Main window.
2 Find the desired image[667], keep it on the screen and click on **File**->**Export**. A window appears (different for each computer.)
3 Choose a directory for the exportation, enter a file name and accept the operation. The image is automatically exported and the system goes back to the module's Exporting a delivery image[668] window.

9.6.12.8 Sending delivery images by Email

This operation allows to send all the pages for the current slip.

1 Click on **Orders**->**Delivery Imaging** from the Main window.
2 Find the desired image[667], keep it on the screen and click on **File**->**Email**. A window appears, different for each operation.

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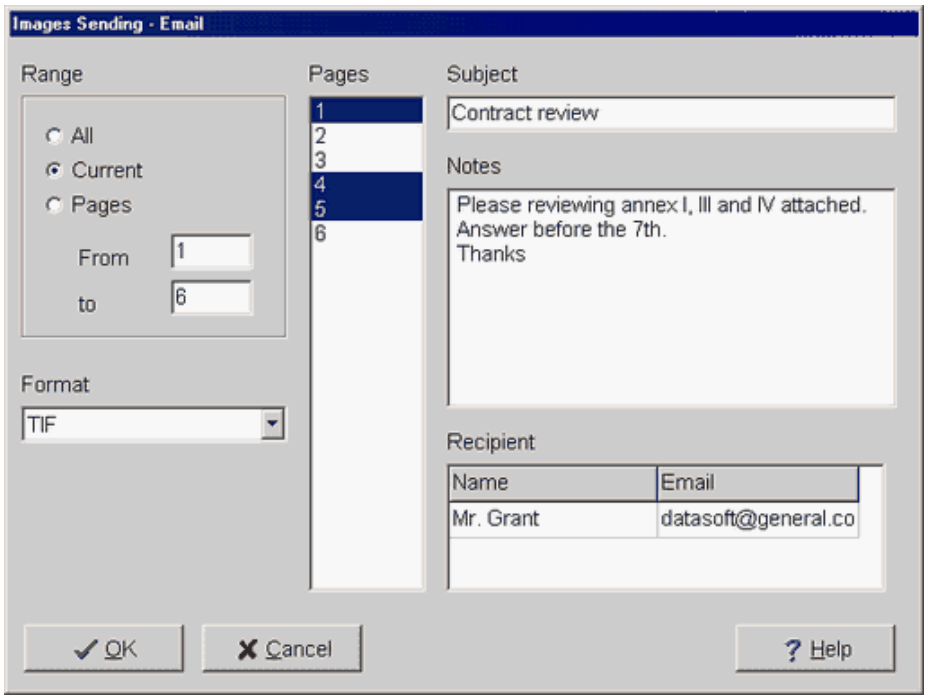

3 Select the pages that must be sent. Enter a subject and notes if so desired, then enter a recipient and an email address in the appropriate fields. Choose a file format (TIFF, PNG, PDF) and press **OK** to send images.

Note : When sending images by mail, the SMTP address of the record center must be set before in the System Information[374] module. Select the one desired and press **OK**. The images will automatically be sent.

9.6.12.9 Copying the current delivery image

1 Click on **Orders**->**Delivery Imaging** from the Main window.
2 Find the desired image[667], keep it on the screen and click on **Edit**->**Copy Image**. The image is then copied temporarily in the computer clip board.
3 Open any program for image treatment and paste the image in question. This image could then be saved and used later on demand (sending it by mail as an attachment, printing it, etc).

9.6.12.10 Viewing an image

Many options are offered when viewing an image; one can smooth a black and white image as well as adjust the size of the image viewed.

Smoothing out a black and white image

1 Click on **Image** from the Imaging module.
2 Click on **View -> Anti aliasing**
3 The image will automatically be smoothed out.

Note: Only images in black and white in the bmp format can be smoothed out.

Changing the size of the image

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1 Click on **Image** from the Imaging module.
2 Click on **View -> Actual Size | Fit width | Fit height | Full page**
3 The image will automatically be sized properly.

9.6.12.11 Editing the current delivery image

1 Click on **Orders**->**Delivery Imaging** from the Main window.
2 Find the desired image[667], keep it on the screen then click on **Image**. Select one of the following menu options :

- **Rotate**->**90 degrees**|**180 degrees**|**270 degrees**.
  This option allows to rotate the image (90°,180° or 270°), in order to display it in the desired position. It is useful when a document has been scanned on the wrong side and cannot be read on the screen. It is then not necessary to scan this document again.

- **Negative**
  This option allows to display the negative. The black and white characters are then reversed.

9.6.13 Deleted Order Item

9.6.13.1 Overview (Deleted Order Item)

If an order is not yet picked, it is possible to remove items or delete the order at the request of the customer. This module registers these items, along with the time and date of deletion, and the employee who processed it. Such information can be useful in tracing why a customer may have failed to receive an item.

Available reports

- None. (See the Report[501] module)

Fields[671] (see the next section)

Tasks

- Searching a deleted order item[671]
- Scrolling the list of deleted orders[672]

Distinctive menu options: (None)

Module window:

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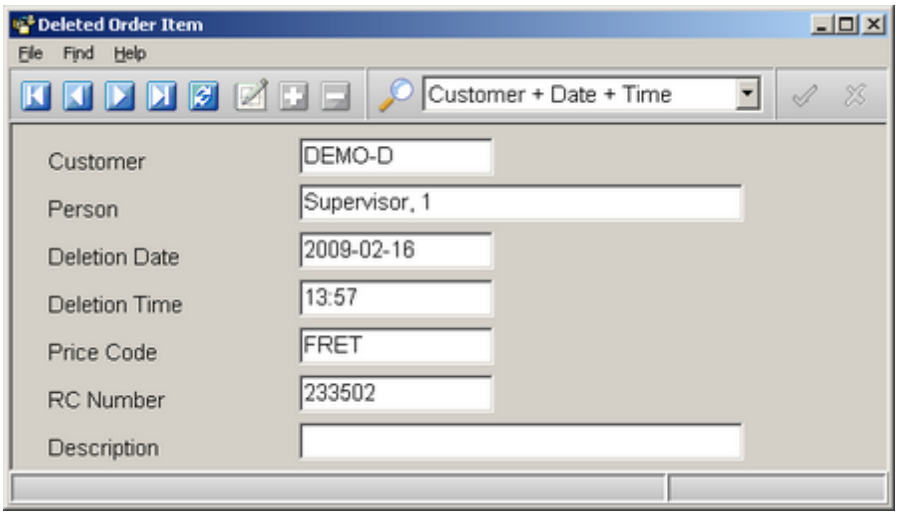


9.6.13.2 Fields (Deleted Order Item)

Customer
The Customer Key[248] of the customer associated with the order.

Person, Deletion Date, Deletion Time
The employee who removed the item or delete the order, and the date and time. This may help you to trace back the circumstances that led to the order item being deleted.

Price Code
Price code associated with the deleted item. For example, a file retrieval price code will appear if the order was for a file from a box.

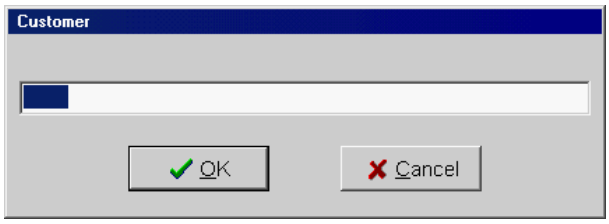
RC Number
For boxes or files, the RC number[448] identifying the deleted item. This is assigned to the system when the box or file record is created.

Description
Description of the deleted item. The source of this description depends on the type of item or service.

9.6.13.3 Searching a deleted order item

This operation allows to find a specific deleted order item by entering the customer's code, the approximate date and the approximate time of the potential deletion.

1 Click on **Order**->**Deleted Order Item** from the Main window.
2 Click on **Find**->**Find**. A window appears.



3 Enter the code of the desired customer and press **OK**.

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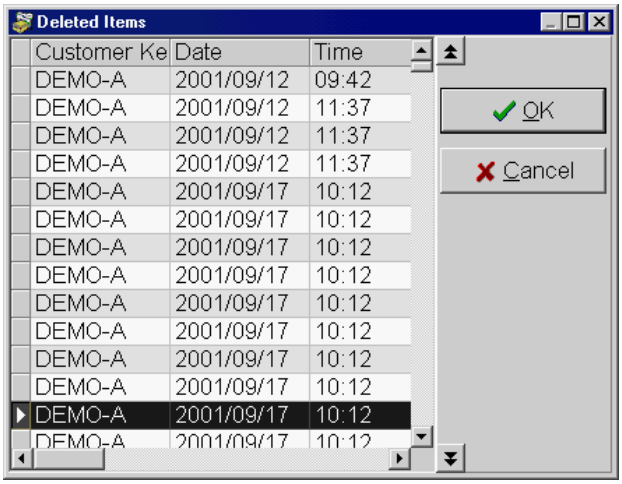
4 Enter an approximate date and time for the deletion and click on the **Accept** button. The system displays the first item that has been deleted on the date and time previously entered, or any closed record. It is possible to view the other items by using the navigation shortcuts.

9.6.13.4 Scrolling the list of deleted orders

Scrolling the deleted order items allows to view rapidly all the records.

1 Click on **Order**->**Deleted Order Item** from the Main window.
2 Click on **Find**->**Scroll**. A window appears.



3 Press the **Up Arrow** or the **Down Arrow** to scroll the list and press **OK** when finished.

9.6.14 Delivery Maintenance

9.6.14.1 Overview (Delivery Maintenance)

The Delivery Maintenance module supports management and maintenance related to the order fulfillment process. Access to this module is typically reserved for supervisors.

Available reports

- Deliveries not delivered (for a specific period)[681]
- Items not delivered (for a specific period)[681]
- Process errors for a specific period)[681]

Fields (see the next section)

- None. (See the Report[501] module)

Distinctive menu options:

File menu

- Reconcile process errors[673]
- Route Templates[674]

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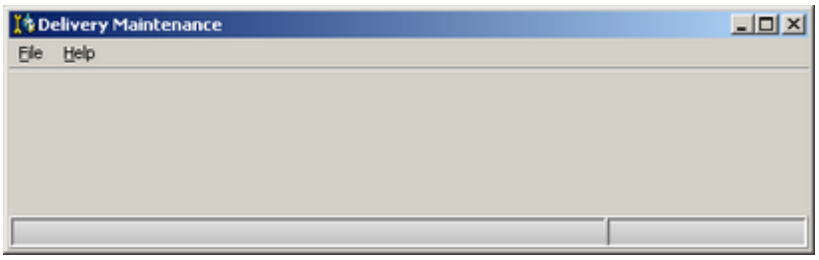
- *** On site shred calendar
- *** Off site shred calendar
- *** Create recurring orders
- Re-open a delivery for return 676
- Unlocking an order 676
- Change delivery type 677
- Change delivery building 677
- Set delivery delivered 678
- Set delivery verified 678
- Automatic verification 678 (of multiple return deliveries)
- Daily tasks 679
- Daily tasks for all buildings 679
- Set AM/PM for tape schedule 680

Module window:

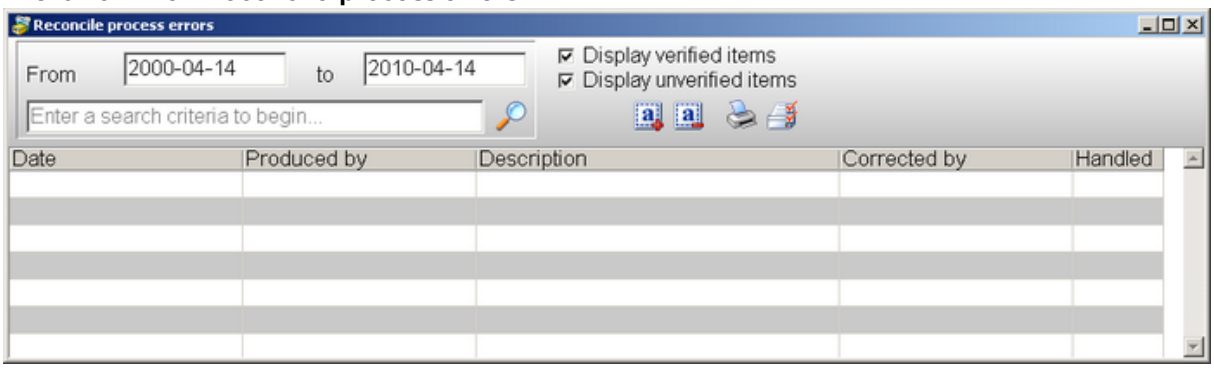


9.6.14.2 Reconciling process errors

If there is an error in processing items while moving inventoried items around the record center and on deliveries, EDC RC produces error messages so that the errors can be fixed. It is important to reconcile these in a timely manner, so that your inventory and billing will be correct.

This interface enables you to view process errors and verify that they have been handled.

1. Click on **Orders->Delivery Maintenance** from the Main window.
2. Click on **File->Reconcile process errors**



- In the From and To fields, enter a date range over which to view errors, then click the search glass icon.
- You may limit results by entering search criteria, such as an employee name.
- To display only error that have not yet been handled, ensure that only the "Display unverified items" box is checked.
- To mark errors as verified error, highlight the errors and press [Space]. Pressing the a+ icon will

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select all times.

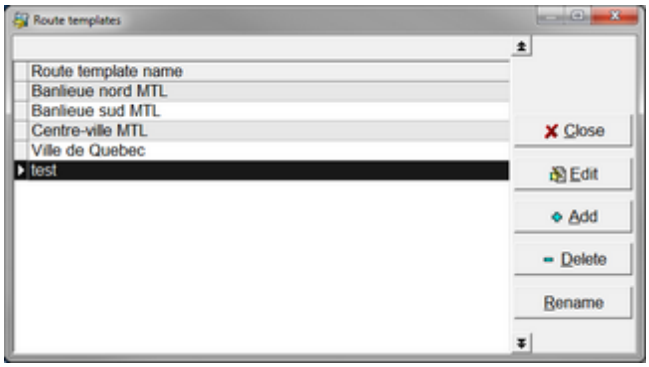
9.6.14.3 Managing route templates

Route templates help you to more efficiently manage the trips that your delivery vehicles make each day. They consist of an ordered list of delivery addresses that might or might not require service on a given day. When you create a trip based on a route template, EDCRC looks for all available deliveries to addresses on the template, and adds them to the route in the correct order.

Available deliveries are those which have already been created but have not yet been assigned to another route (trip).

To open the interface for directly managing your route templates:

1. Open the **Orders->Delivery Maintenance** module.
2. From the menu, select **File->Route Templates**.
3. The following window appears:



To add a blank route template:

- Click the **Add** button
- Type a unique route template name in the dialogue that appears, and press **Enter**.
- The new route template is now available to use.

To delete a route template

- Select the route template to delete, highlighting it in black.
- Click the **Delete** button.
- The system prompts, "Delete the current record? Confirm". Click **Yes**.
- Your route template has been permanently deleted.

To rename a route template

- Select the route template to rename, highlighting it in black.
- Click the **Rename** button.
- Type the new name over the old one, and click **OK**.
- Your route template has been renamed.

To edit a route template

- Select the route template to edit, highlighting it in black.
- Click the **Edit** button. The route template editor appears.

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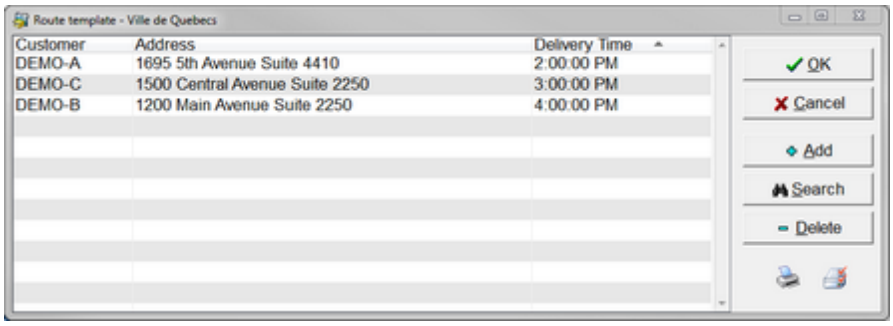

- **To modify the delivery order**: In the template editor, edit the value in the **delivery time** column. The exact value of the time has no relevance, but deliveries will be sorted in order of delivery time. To move an address earlier, decrease the value in the delivery time column.
- **To remove an address:** Highlight the address, then click the **delete** button.

To search for and add addresses not yet on routes:
- Click the **Search** button. The list of addresses not on routes appears.
- Using the mouse, select one or multiple consecutive addresses, then click okay.
- The addresses are added to the template. Repeat if necessary.

To add an address for a specific client (potentially already on another route):
- From the template editor, click the **Add** button.
- Select the account (starting to type the account name will position you in the list)
- Select the address from the list of addresses belonging to the account.
- If the address is not already on the template, it will be added.

Note: If you have already created delivery route trips in the delivery route module, the fastest way to populate a route template is by Merging the addresses from a trip into your route.

To populate a route template from an existing route trip:

See Populating a route template from an existing route trip 675

9.6.14.4 Populating a route template from an existing route trip

The easiest way to rapidly manage your delivery route templates is by populating them with delivery addresses based on one or more completed trips and then making minor adjustments.

Step 1: Obtain a route template to work with

- Open the **Orders->Delivery Maintenance** module.
- Select **File->Route templates** from the menu.
- If you want a new template, click the **Add** button to add a new one.
- If you want to overwrite an existing template, you can **edit** it and remove all unwanted addresses, or you can delete it and add it back.

Step 2: Merge in delivery addresses from existing routes

- In the **Orders->Delivery Route** module, locate the main route that you wish to start with.
- Press **Ctrl-E** to go into Edit mode.
- Select the Merge route template check-box

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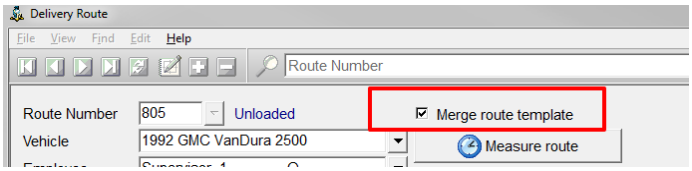


- Press **Ctrl-Enter** or click the **Green check mark** to accept.
- From the list of route templates, select the one that you wish to add these addresses to.
- Repeat the above steps with additional trips if desired.

Step 3: Edit the route if necessary

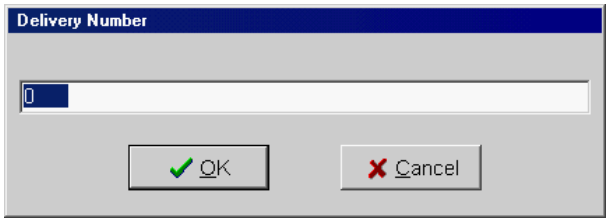
- See the previous topic, Managing route templates 674 for full details.
- Open the **Orders->Delivery Maintenance** module.
- Select **File->Route templates** from the menu.
- Select the route template and click the **Edit** button.

Options for editing include adding or removing addresses as route stops, and adjusting the order by modifying the delivery time placeholder.

9.6.14.5 Reopening a delivery for return

This operation can be useful, especially when a wrong quantity of boxes was returned. When reopening a return, the error can be corrected. This procedure will guaranty the refilling and the billing of the boxes. These errors are generally noticed only when verifying returns.

1 Click on **Orders->Delivery Maintenance** from the Main window.
2 Click on **File->Re-Open Delivery For Return**. A window appears.



3 Enter the delivery number in question and press **OK**. The system automatically updates the status of the delivery that becomes again CLOSED.

9.6.14.6 Unlocking an order

When an order is being accessed, it is locked by the system in order to prevent that two different users try to access that order at the same time. If a computer failure occurs during the processing, the order stays locked when the system restarts. This operation allows then to unlock the order and complete its process.

1 Click on **Orders->Delivery Maintenance** from the Main window.
2 Click on **File->Unlock Order**. A window appears.

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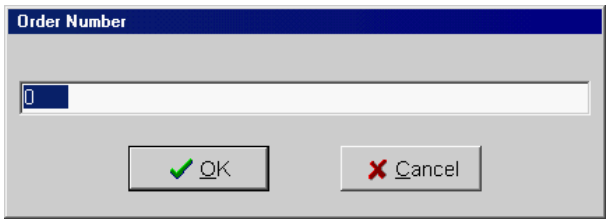
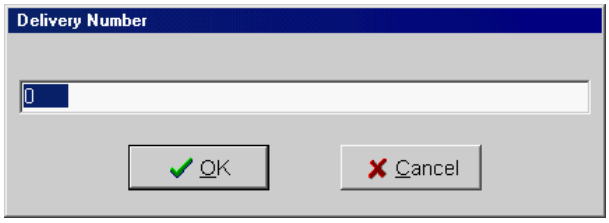


3 Enter the order number in question and press **OK**. The system automatically unlocks the order that can be edited for modification and normally processed.

9.6.14.7 Changing a delivery type

The current operation allows to change a delivery type, especially when it is necessary not to overcharge a customer for a rush delivery that was delivered late.

1 Click on **Orders**->**Delivery Maintenance** from the Main window.
2 Click on **File**->**Change Delivery Type**. A window appears.



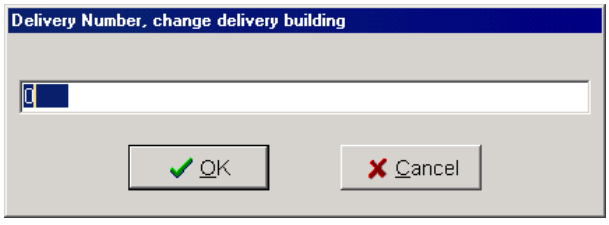
3 Enter the delivery number in question and press **OK**. A list containing all the delivery types defined in the system and granted to the customer is displayed.
4 Select the desired delivery type and press **OK**. The system automatically updates the delivery.

Note : When choosing a delivery type with delivery delays, a message appears and asks if the delivery time must be calculated from the current time.

9.6.14.8 Changing a delivery building

Under some circumstances, a delivery can be created without a destination building. The current operation allows to select or change the building for any delivery.

1 Click on **Orders**->**Delivery Maintenance** from the Main window.
2 Click on **File**->**Change Delivery Building**. A window appears.



3 Enter the delivery number in question and press **OK**. A list containing all the buildings of the record center is displayed.
4 Select the desired building and press **OK**. The system automatically updates the delivery.

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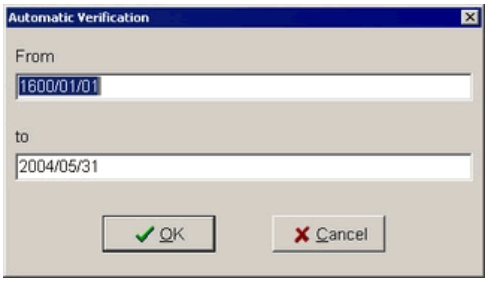
9.6.14.9 Automatically verifying returns

Returns go to the verified state once all items on them have been moved to a permanent location. A report of unverified returns can be seen in the Return Verification[658] module. This is a useful tool in ensuring that all record center work is systematically completed. The present function should only be used with great caution, as it causes the specified returns to be marked as verified, without the items being scanned to final locations.

1. Click on **Orders->Delivery Maintenance** from the Main window.
2. Click on **File->Automatic Verification**. A window appears.



3. Select a range of delivery dates to verify and press **OK**
4. If you wish to verify deliveries for a specific customer, click **Yes** and enter the customer key. Otherwise click **No**.

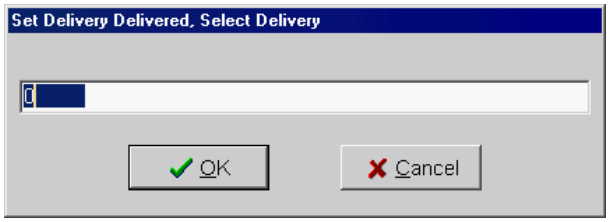
The software will automatically verify all the returns for the specified customer(s) within the date range selected.

9.6.14.10 Marking a delivery as delivered

The current operation allows to indicate that all the items included on a delivery have been delivered properly.

This operation is essential for customers who do not use the Delivery with PDT[871] option, or for exceptional circumstances when the PDT fails during a delivery.

1 Click on **Orders->Delivery Maintenance** from the Main window.
2 Click on **File->Set Delivery Delivered**. A window appears.



3 Enter the number of the wanted delivery and press **OK**. The state of the delivery in question automatically becomes DELIVERED.

Note : Only the CLOSED deliveries can be set as delivered.

9.6.14.11 Marking a delivery as verified

Normally, deliveries are verified in the Return Verification[658] module. But sometimes, it can be necessary to manually indicate that all the items have been verified without performing the entire return

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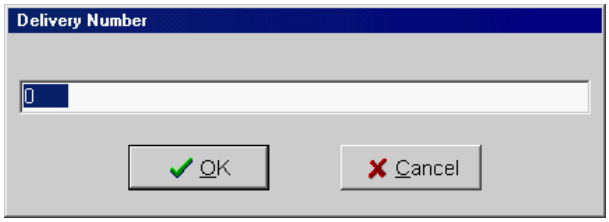
verification process. This can be useful when a delivery has been returned and verified but, for some reasons, not registered in the system.

1 Click on **Orders**->**Delivery Maintenance** from the Main window.
2 Click on **File**->**Set Delivery Verified**. A window appears.



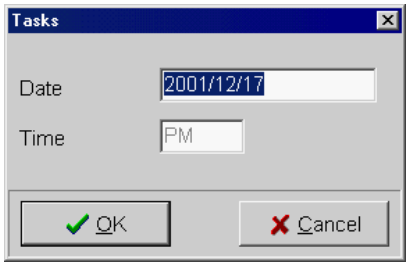
3 Enter the delivery number in question and press **OK**.

Note : Only the RETURNED deliveries can be verified. If they have not been returned, an error message will appear and the current operation will not be accepted.

9.6.14.12 Establishing daily tasks

This operation allows the record center to evaluate the tasks that have to be performed, the labor time and how many people may have to work that day. This report can be run for the current building or for all buildings

1 Click on **Orders**->**Delivery Maintenance** from the Main window.
2 Click on **File**->**Daily Tasks | Daily Tasks for All Buildings**. A window appears.



3 Enter the date and moment (AM or PM) in question and press **OK**. A report's window appears.

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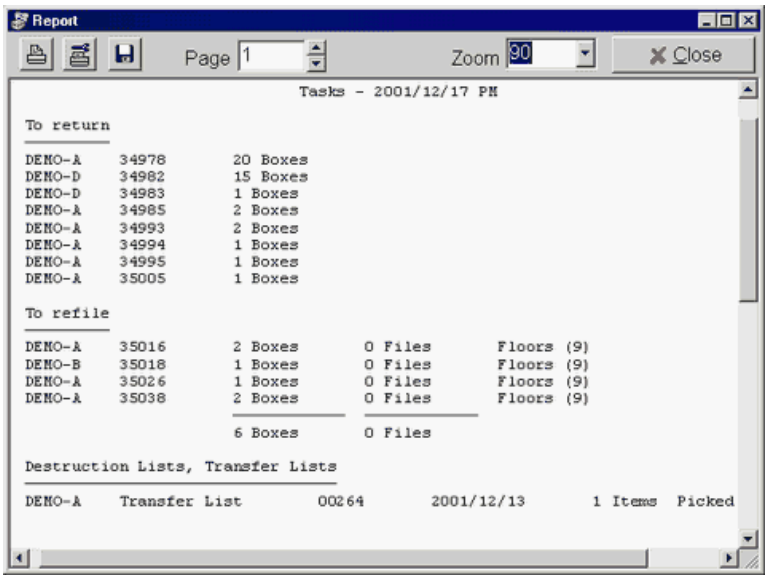
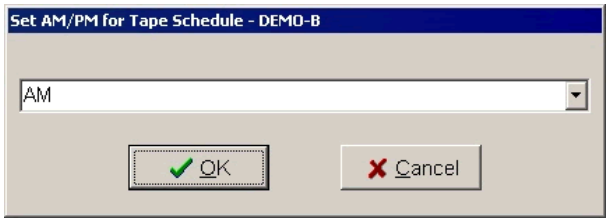

Report
Page 1
Zoom 90
Close
Tasks - 2001/12/17 PM
To return
DEMO-A 34978 20 Boxes
DEMO-D 34982 15 Boxes
DEMO-D 34983 1 Boxes
DEMO-A 34985 2 Boxes
DEMO-A 34993 2 Boxes
DEMO-A 34994 1 Boxes
DEMO-A 34995 1 Boxes
DEMO-A 35005 1 Boxes
To refile
DEMO-A 35016 2 Boxes 0 Files Floors (9)
DEMO-B 35018 1 Boxes 0 Files Floors (9)
DEMO-A 35026 1 Boxes 0 Files Floors (9)
DEMO-A 35038 2 Boxes 0 Files Floors (9)
6 Boxes 0 Files
Destruction Lists, Transfer Lists
DEMO-A Transfer List 00264 2001/12/13 1 Items Picked

4 Click on the **Print** button to produce a paper list of these tasks and click on the **Close** button when finished.

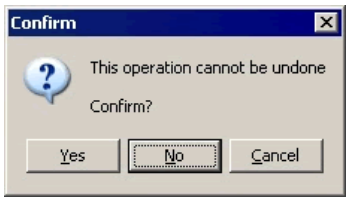
9.6.14.13 Set AM/PM in Tape Schedule

This operation can be useful when a customer wants to change the delivery period (AM/PM) of all his tapes at the same time.

1 Click on **Orders**->**Delivery Maintenance** from the Main window.
2 Click on **File**->**Set AM/PM in Tape Schedule**. A window appears.
3 Enter the customer key or press **OK** to have the list of customers, select a customer (it will appear highlighted) and press **OK**. Press **OK**.
4 A window appears



5 Select AM or PM in the drop-down field. Press **OK**.
6 A verification message appears



7 To confirm press **Yes.** To abort the entire operation press **No** or **Cancel**.

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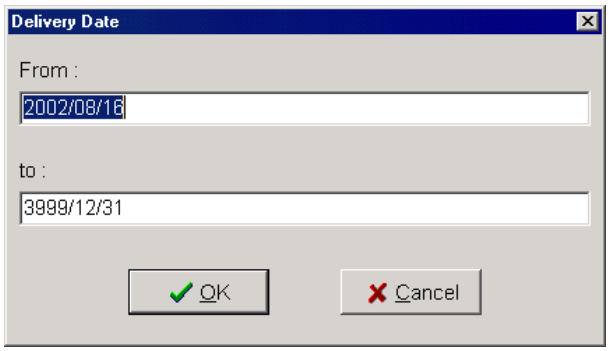
9.6.14.14 Viewing or printing reports

Producing the report of deliveries not delivered

1 Click on **Orders**->**Delivery Maintenance** from the Main window.

2 Click on **File**->**View Report**|**Print Report**->**Deliveries not delivered**. A window appears.



3 Enter a delivery date range and press **OK**. The report is automatically displayed or printed. It gives the delivery numbers in question, the delivery dates and delivery states.

Producing the report of items not delivered

1 Click on **Orders**->**Delivery Maintenance** from the Main window.

2 Click on **File**->**View Report**|**Print Report**->**Items not delivered**. A window appears and asks to enter an interval of deliveries.

3 Enter the desired interval and press **OK**. The report is automatically displayed or printed. It gives the code of the customer in question, the item description, the RC number for files and the box where they are stored, and the delivery number.

Producing the report of process errors

1 Click on **Orders**->**Delivery Maintenance** from the Main window.

2 Click on **File**->**View Report**|**Print Report**->**Process Errors**. A window appears and asks to enter an interval of dates.

3 Enter the desired interval to produce the report and press **OK**. The report is automatically displayed or printed and gives the date, time, employee name and description for each error.

Note that using the process for Reconciling process errors[673] is now the preferred method for working with process errors.

9.6.15 Recurring Orders

9.6.15.1 Overview (Recurring Orders)

This module is used to create recurring orders for line items and shredding container rotation and emptying.
These orders may be scheduled according to a variety of monthly, weekly, and daily patterns.

Recurring orders are generated every day at 9:00 AM, (or after 9 AM if the system is not running at that time), for the subsequent delivery date. For example, if the first scheduled delivery is to be on Wednesday, the recurring order should be created prior to 9 AM Tuesday.

Note: Recurring orders are created with a specific authorized user and delivery type. If the user is made inactive or loses access to this delivery type, the system will be unable to create the order. Therefore, it is good practice to create a user for recurring orders, with access to all available delivery types.

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Available reports

- Recurring orders for a customer

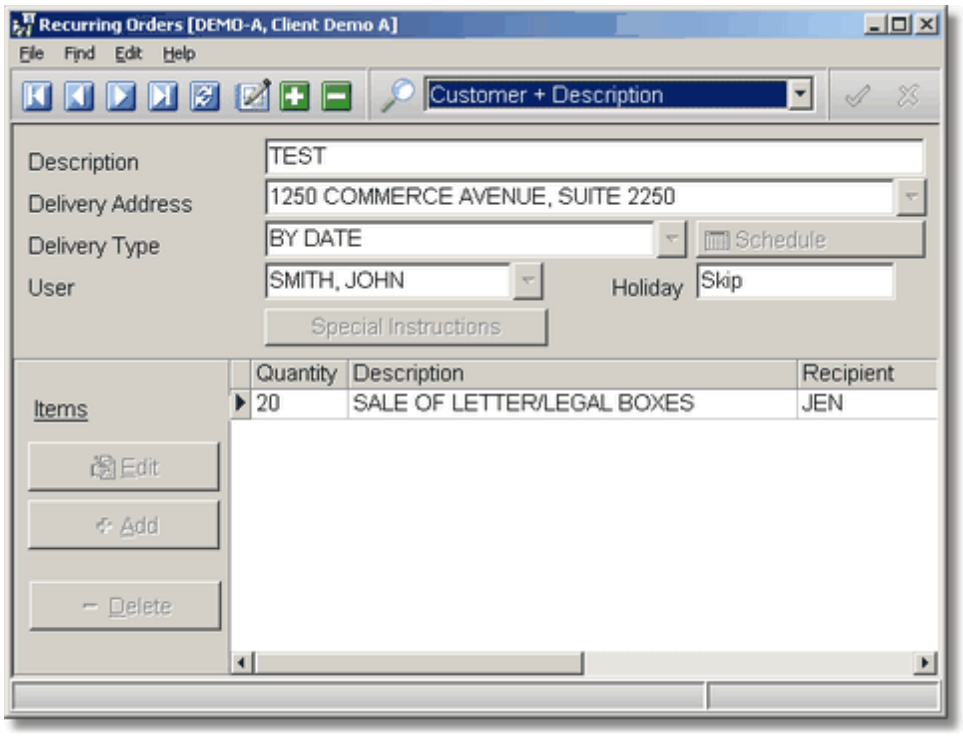
Fields[682] (see the next section)

Tasks

- Adding a recurring order[683]
- Editing or Deleting a recurring order[687]
- Viewing recurring orders for a customer

Distinctive menu options: (none)

Module window



9.6.15.2 Fields (Recurring Orders)

Description

Alphanumerical field that contains the description of the recurring order.

Delivery Address

Drop-down list containing all available delivery addresses for this customer.

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Delivery Type
Drop-down list containing all available delivery types for this customer.

Schedule
Button leading to a schedule creator. For more information on how to create a schedule, see the Adding a recurring order 683 topic.

User
Drop-down list containing all the user's of this customer.

Holiday
Choice-field containing the following choices : Skip, Deliver Before, Deliver After.
This field is used to set the software behavior when the recurring order falls on a holiday or non-business day, it either skips the delivery for that set date or delivers it the day before or after.

Special Instructions
Button to add notes to appear with each scheduled order. These will appear on the delivery slip.

Items

- **Edit** - Button used to edit the list of items.
- **Add** - Button used to add line items to the recurring order.
- **Delete** - Button used to delete one or many items in the list.

9.6.15.3 Adding a recurring order

To add a recurring order
1. Click on **Order->Recurring Orders** from the Main window.
2. Click on **Edit->Add**. A dialogue box prompts for a customer.
3. Enter the customer key in the field and press **OK**. A blank recurring order appears in edit mode.

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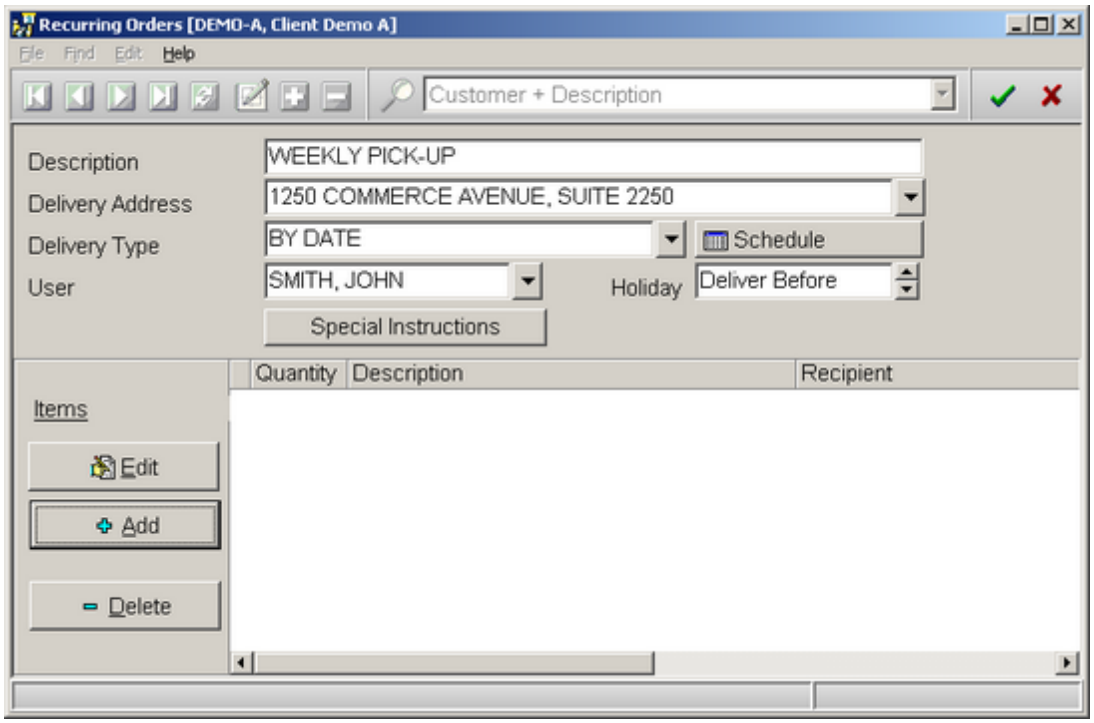

4. Enter a description for the order.
5. Select a delivery address by highlighting it in the drop-down list and clicking **OK**.
6. Select a delivery type by highlighting it in the drop-down list and clicking **OK**. (Note that only "by date" delivery types will be available.) When the schedule is set, press **OK**.
7. Select the user in the list (it will appear highlighted) and press **OK**.
8. Specify how to handle deliveries that would fall on **Holidays** and other days that the record center is not opened. (options include Deliver after, Deliver before, and Skip.)

Add items

9. Add items to the order by pressing on the **Add** button. Depending on the delivery type, different options will be available.
10. Select the type of item to add (Returns/Pickups, Line Item, Shredding container / bag rotation, Shredding container emptying, On site or off site purge items.)
11. Select the item from the list
12. If prompted, select the department and sub-department for billing purposes
13. Enter the quantity and (optionally for line items) a recipient and press **OK**.

14. Click on the **Special Instructions** button to add instructions to appear on each order.
15. When all the items have been added to the list, press the **Accept** button.
16. Press on the **Schedule** button to set the order's delivery dates. A window appears.

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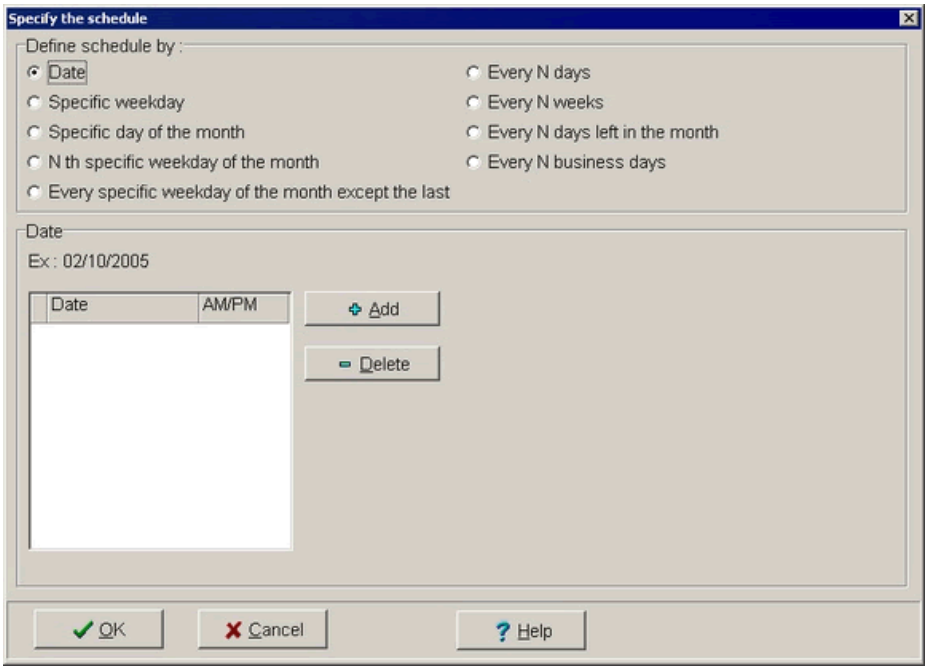
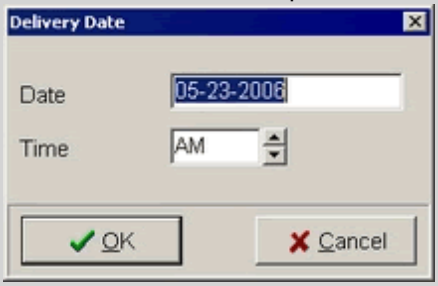


17.Select the way you want to define the schedule in the list of options. For each option a different set up is shown :

- When Date us selected :

To add a date in the list, press on the **Add** button. A window appears



- Enter a date and select a time of delivery (AM or PM) and press **OK**.

- To delete a date, select a date in the list (it will appear highlighted) and press on the **Delete** button.

- When Specific weekday is selected :

- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

- When Specific day of the month is selected :

- Select a Day of the month in the list (1,2,3...).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

- When N th specific weekday of the month is selected :

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- Select a N th week (First, second, third ...) in the choice field.
- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

- When Every specific weekday of the month except the last is selected :

- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

- When Every N days is selected :

- Select a number of days (N days) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

- When Every N weeks is selected :

- Select a number of weeks (N weeks) in the choice field.
- Select a Day of week (it will appear highlighted).
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

- When Every N days left in the month is selected :

- Select a number of days left in the month (N Days Left) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

- When Every N business days is selected :

- Select a number of business days (N Business Days) in the choice field.
- Enter a Start Date and an End Date.
- Select a Time of delivery.
- Select a specific Month (it will appear highlighted) or select the All option.

9.6.15.4 Viewing recurring orders for a customer

The following provides a report of the recurring orders scheduled for a customer over a given period.

1. Click on **Orders->Recurring Orders** module from the Main window.
2. From the menu, select **File->View Report->Recurring orders of customer**.
3. A dialogue window appears. Enter a **customer key** and click **Okay**, or click okay without entering a customer to select from a list.
4. A dialogue window appears. Enter the range of dates over which to report the recurring orders.

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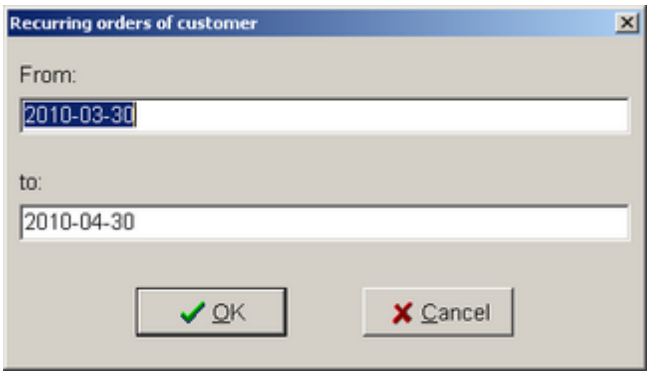
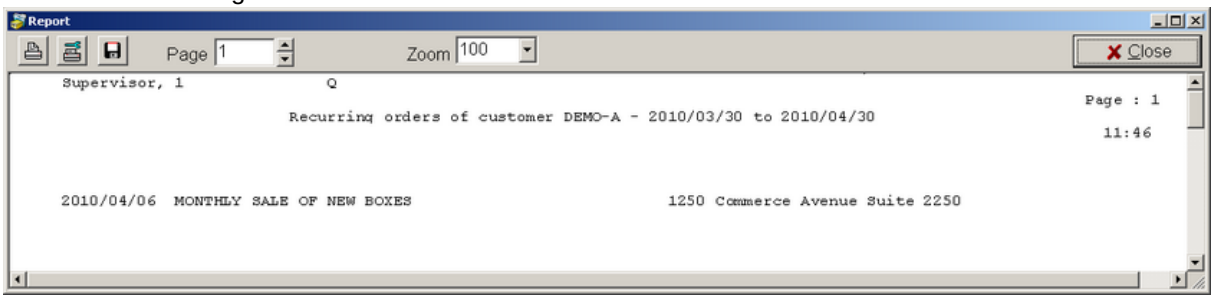


5. A report appears, listing the date, description, and address of the recurring orders for that customer over that date range.



9.6.15.5 Editing or Deleting a recurring order

Editing a recurring order

1. Open the **Order->Recurring Orders** module
2. Navigate to the order to modify.
3. From the menu, select **Edit->Edit**.
4. Edit the information in the entry form.

- To add an item to the order
  - o Press the **Add** button.
  - o To add a line item, click on the Line Item menu item. A list of line items appears. Select the line item to add (it will appear highlighted) and press **OK**.
  - o To add a shredding container rotation, click on the Shredding container / bag rotation menu item. A list of container types appears. Select the shredding container to rotate (it will appear highlighted) and press **OK**.
  - o To empty a shredding container, click on the Shredding container emptying menu item. A list of container types appears. Select the shredding container to empty (it will appear highlighted) and press **OK**.

- To edit an existing item from the order:
  - o Select the desired item (it will appear highlighted)
  - o Press on the **Edit** button.
  - o Edit the item's quantity and press **OK**.

- To delete an existing item from the order:

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- Select the desired item (it will appear highlighted)
- Press on the **Delete** button.

5. When all the changes have been made, press the **Accept** button (green check mark).

For more information on the different fields to edit, consult the Fields (Recurring Orders)[682] and the Adding a recurring order[683] topics.

Deleting a recurring order

1 Click on **Order->Recurring Orders** from the Main window.
2 Search the order to delete.
3 Click on **Edit->Delete**. A confirmation message appears.
4 Press **Yes** to perform the deletion, and **No** or **Cancel** to abort the deletion.
5 The recurring order will automatically be deleted.

9.7 Accounting (Accounting tab)

9.7.1 Outline (Accounting)

The accounting tab and associated modules provide tools for automating the calculation of charges and invoicing of customers.

In EDC, prices are associated to goods and services using price codes. All charges and descriptions on invoices come from price codes. Price code are defined in the general pricing module[734]. Any price code can be overridden for specific customers in the customer pricing module[743].

There are three sources of charges on invoices:

1. Storage costs are calculated based on the inventory.
2. Charges may be added directly to the invoice, either manually[701] or as periodic invoice items[749]. Shredding charges may be adjusted directly by drivers based on work performed, using rcMobile[214].
3. All other charges are collected from the deliveries[712] dated during the invoice period.

Various price codes are discussed further in the chapter on general pricing[734]. For detailed instructions on setting up for billing, see the topics on Configuring EDC for invoicing[98] and setting up the customer to be billed[125].

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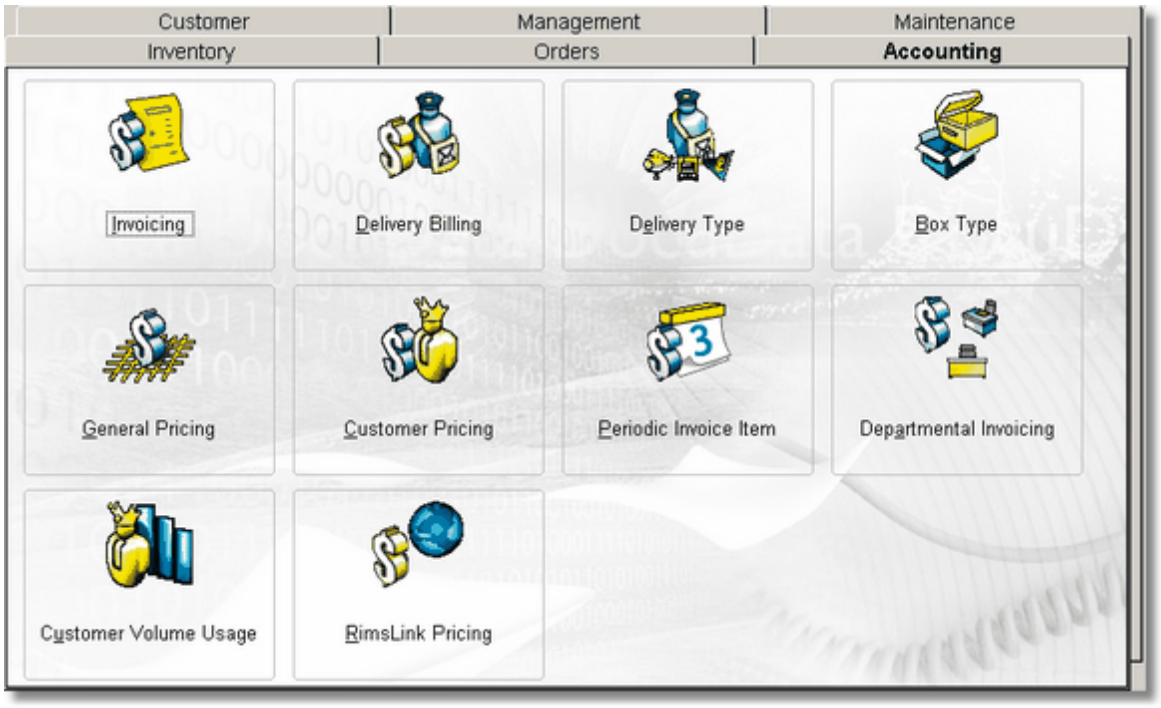

Modules

- Creation of invoices for customers[689], according to their billing parameters
- Consultation and management of charges for each delivery[712]
- Configuration of delivery types[722]
- Configuration of box types[727]
- Configuration of general pricing[734] for all services and operations at the record center
- Overriding of general pricing for customers[743] as required
- Configuration of periodic invoice[749] items
- Configuration of departmental invoicing[753] for a customer
- Consultation of the volume in storage[757] for all customers
- Mapping price code equivalence with partner record centers to serve shared customers[760]

9.7.2 Invoicing

9.7.2.1 Overview (Invoicing)

Various settings throughout EDC RC determine how customers are billed for the services they receive. The Invoicing module enables you to efficiently create invoices based on those rules. You may then view, modify, and distribute these invoices, and export the charges to a third-party accounting software to track payment.

Note that EDC requires that all deliveries for the period be returned before it will create an invoice for a given customer, because the calculation of charges is affected by the returning items.

Available reports

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- current invoice
- details of the current invoice
- delivery summary of the current invoice
- (See the Report[501] module for additional reports)

Fields[691] (see the next section)

Tasks

- Manually creating, editing, printing or deleting an invoice[692]
- Creating, editing, printing or deleting selection for auto-invoicing[695]
- Creating or printing invoices with auto-selection[698]
- Adding notes to an invoice[699]
- Printing multiple invoices[699]
- Exporting the invoicing to other billing systems[700]
- Adding, editing, deleting or viewing items of the current invoice[701]
- Viewing or printing some reports[703]
- Printing an invoice to a file[703]
- Previewing an invoice[704]
- Previewing invoice totals[705]
- Viewing the web licenses soon to be expired[706]
- Viewing or printing items excluded from a selection[707]
- Viewing or printing a list of unbilled customers[708] Links[475]
- Editing the layout of an invoice[710]

Distinctive menu options:

File menu

- Create invoice[692]
- Delete invoice[692]
- Print invoice[692]
- Printing an invoice to a file[703]
- Print detailed invoice[703]
- Print delivery summary[703]
- Print multiple invoices[699]
- Preview invoice[704]
- Previewing invoice totals[705]
- Commission report[705]
- *** Export commission report[705]
- Export (To QuickBooks | To text format)[700]

View menu

- Invoice
- Detailed invoice
- Delivery summary
- Notes[699]
- Show customer note[699]
- Show global note[699]
- View web licenses that expire soon[706]

Create menu

- Auto selection[695]
- Edit selection[695]

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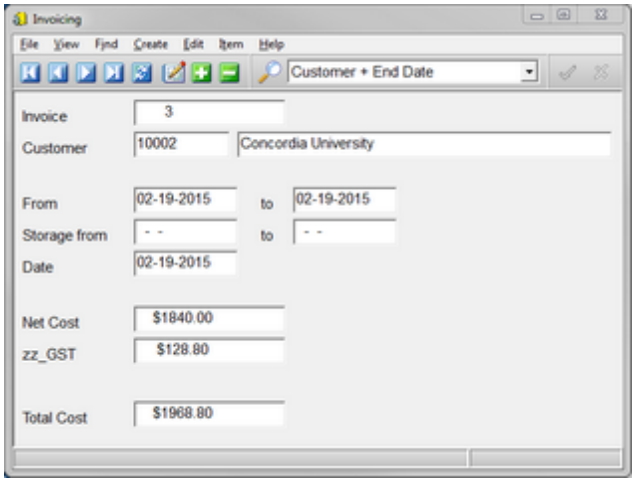
- Print selection 695
- Erase selection 695
- View | Print excluded from selection 707
- View | Print unbilled customers 708
- Create invoices 698
- Print selection invoices 698
- Create service invoices (Customer only | All customers) 709

Edit menu
- Notes 699

Item menu
- Add item 701
- Edit item 701
- Delete item 701
- View items 701

Module window:



9.7.2.2 Fields (Invoicing)

Invoice
Numeric field (cannot be modified).
This number is given to the invoice by the system. For accounting purposes it is essential to keep a certain control over the numbers and to make sure that none are missing. In order to keep a continuous sequence with invoice numbers, if an invoice has to be deleted, it would be better to proceed to the deletion before creating the next invoice.

Customer
This field indicates the client number and the name of the customer for whom the invoice is produced.

From...to
This field indicates the interval of dates for services to be billed. It indicates by default the interval of dates in the month previous to the current month, but it can be modified manually. The current invoice considers all the services given to the customer from the starting date to the last date inclusively.

Rent from...to
This field indicates the interval of dates for which the storage fees will be charged. The customer is charged for the box types (incidentally the volume) in storage during this period. The intervals of dates for

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the services and the rent are generally different since the rent fees are usually collected in advance. These fees can be adjusted the month after with a rent credit if the real volume in storage has gone down, because of a destruction or deletion of boxes during the given period. A similar policy can be adopted for boxes added to inventory, which will be charged only for the real time they are in storage or for the whole period (this is determined by the settings of the Rent Credit and Bill full month add/del fields from the Customer Information module.)

Date
This field allows to enter the billing date. The system indicates the current day by default (or when auto creating your invoice run at the beginning of the month it will indicate the last day of the previous month by default), but it can also be modified manually.

Net Cost
This field indicates the cost before taxes.

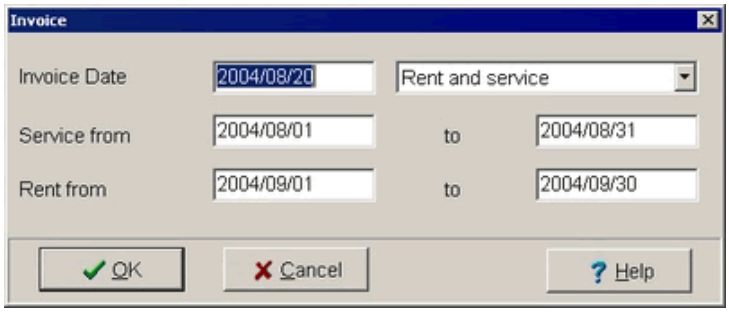
Tax A, B
These fields display the amount of the taxes on the given invoice. The settings in the System Information, Building, Customer Information, General Pricing and Customer Pricing modules determine how these taxes are calculated. Tax rates are taken from the Management->Building module, based on the Building setting in the Customer->Customer Information module.

Total Cost
This field indicates the total amount charged to the customer. It is the net cost plus the applicable taxes.

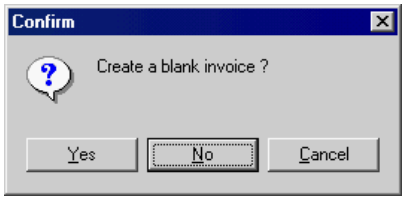
9.7.2.3 Manually creating, editing, printing or deleting an invoice

Manually creating an invoice

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **File**->**Create Invoice**. A window appears.
3 Enter the customer key and press **OK**. A window appears.



4 Edit the "Invoice Date", the "Service from / to", the "Rent from / to" fields if needed. Select the type of invoice (Rent | Service | Rent and Service). Press **OK**.
5 Keep this interval of dates or enter another range of dates and press **OK**. This interval of dates will appear in the From...to field of the current module. A dialog box appears.



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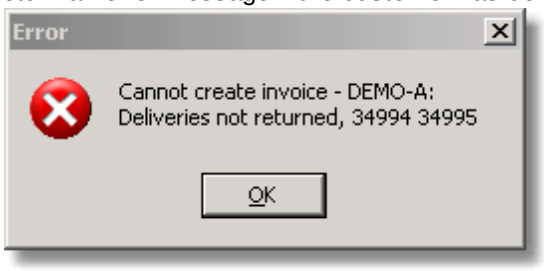
6 There are two different possibilities :

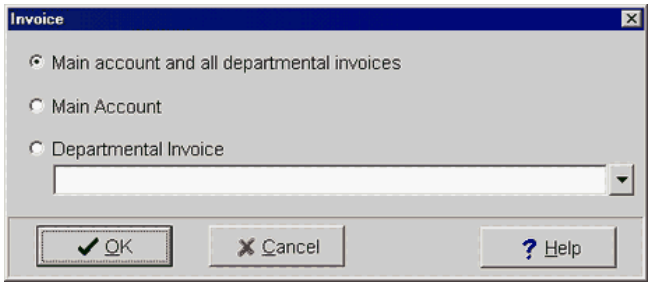
- To create a blank invoice to which the charges will be added manually, click on the **Yes** button. The Rent from...to, Net Cost and Total Cost fields of the current module stay empty.

- To create a regular invoice, click on the **No** button. The system will automatically charge the customer for the fees related to all the delivery items of the given period, for the storage rent of the current month and for the periodic invoice items that apply. All the fields of the current module are filled.

Note : EDC will return an error message if the customer has deliveries for the service period that have not been returned.



7 A window appears for customers that bill by department. (to bill by department, settings must be defined in the Departmental Invoicing module and the Billing field of the Customer Information module must be set to "Department".)



Main account and all departmental invoices : different invoices are created both globally for departments not dissociated in the Departmental Invoicing module and for departments dissociated in this same module.

Main Account : a unique invoice is created only for departments that are not dissociated in the Departmental Invoicing module.

Departmental Invoice : an invoice is created for the selected department or group of departments (set in the Departmental Invoicing module) and includes only the fees related to these.

Note : For Main Account invoice, it can be empty if all the departments for that customer have been dissociated in the Departmental Invoicing module.

8 Select the desired option and press **OK**. The invoices are automatically created, according to the previous selections.

***Editing the current invoice**

An invoice, blank or not, has been created (operation described above). In both situations the invoice can

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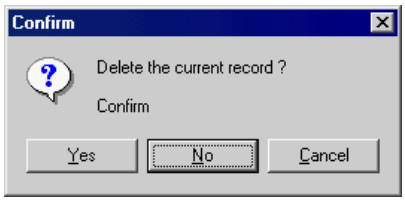
be edited for modification.

1 Keep the invoice newly created on the screen or search for any other invoice to be modified.
2 Click on **Edit**->**Edit** in the current module.
3 Modify the desired information in the appropriate fields and click on the **Accept** button.

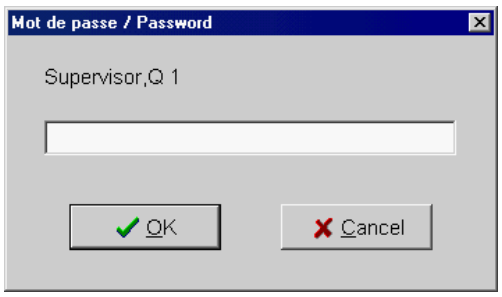
Deleting the current invoice

An invoice was created but for some reason it has to be deleted. This operation can be done as described below but is not advisable. For accounting purposes it is better to keep a continuous sequence with invoice numbers, in order not to have to justify a missing number later.

1 Keep the invoice newly created on the screen or search for any other invoice to be deleted.
2 Click on **File**->**Delete Invoice**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion. A window opens.



Note : This window is an additional security mechanism, since this type of operation cannot be undone and should be approved only by a limited number of authorized users (supervisor, manager, etc).

4 Enter the password and press **OK**.

Printing the current invoice

After its creation, an invoice can be printed and sent to the customer.

1 Keep the invoice newly created on the screen or search for any other invoice to be printed.
2 Click on **File**->**Print Invoice** in the current module. The invoice is printed soon after (see the example below).

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Docu-Dépôt Inc.
1, Van Horne Ave.
Montréal, PQ, H2T 2J1
Telephone: (514) 271-3223
Fax: (514) 271-4012

INVOICE

INVOICE NUMBER 1

DATE 05/01/2001
MM/DD/YYYY

Client Demo D
3, Montcalm
Suite 25b
Montreal, Qc
H1H

Account DEMO-D

ATTENTION:

Net 30 days

QUANTITY	DESCRIPTION	PRICE	AMOUNT
	Rent from 06/01/2001 to 06/30/2001		
135.60 Cubic Feet	STORAGE	$0.1775	$24.07
	Open shelf from 05/01/2001 to 05/31/2001		
5.00 Units	OPEN SHELF REFILING	$1.5000	$7.50
6.00 Units	OPEN SHELF FILE RETRIEVAL	$2.0000	$12.00

GST No.: R129298741
QST No.: 1002911945

SUB-TOTAL $43.57
GST $3.05
PST $1.93
TOTAL **$48.55**

9.7.2.4 Creating, editing, printing or deleting selection list for auto-invoicing

The invoice selection is a list of customers to create invoices is for. It includes whether storage, service, or both are to be included, and the date range to apply to the invoice.

If the customers are auto invoiced[250], the creating the auto selection will look up their billing parameters in the customer information module, and determine the service and storage dates to create the invoice for.

(Note that the dates listed are the service dates. If the invoice includes storage, the storage dates are calculated based on the settings in customer information[252], ie. forward or arrears, for one or more months.)

Creating the selection list

1. Open the **Accounting->Invoicing** module
2. From the menu, select **Create->Auto Selection**. A list of buildings appears.

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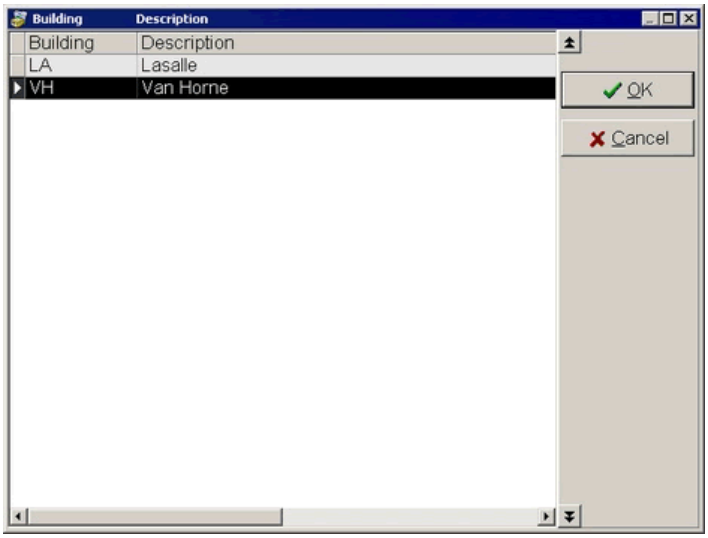
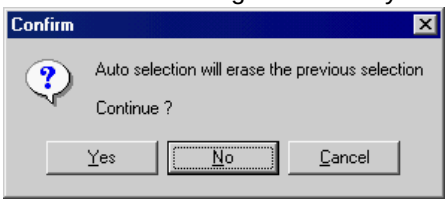
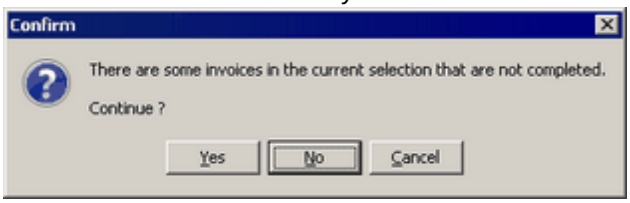


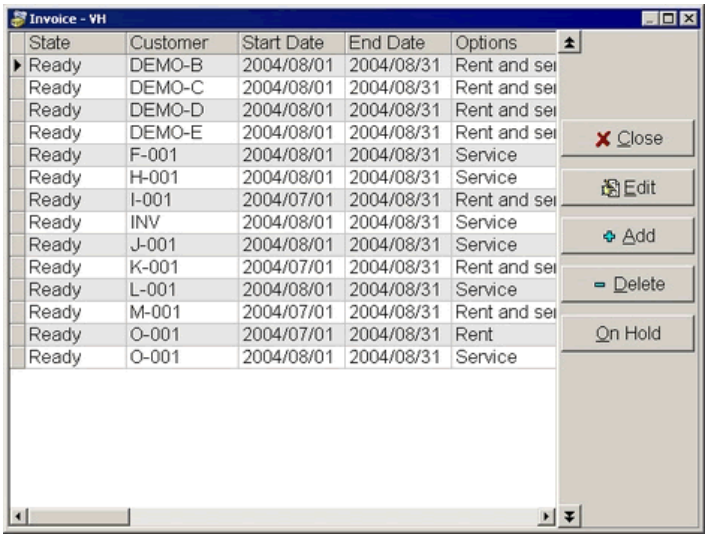
3. Select the building from which you want to run invoices for, and click **OK**. A dialog box appears.



4. Click **Yes** to continue. If any invoices on the current invoice are not Done, a second warning appears.



5. If you see the above message, you should typically investigate the status of the exiting selection before continuing (see edit invoice selection[697] below). If you are sure that you wish to continue, click **Yes**. A window appears prompting for an invoice day.
6. **Enter the date**. This could be any day in the month after the desired service period. You may not have to change this value. Press **Enter**.


Invoice - VH
State
Customer
Start Date
End Date
Options
Ready DEMO-B 2004/08/01 2004/08/31 Rent and se
Ready DEMO-C 2004/08/01 2004/08/31 Rent and se
Ready DEMO-D 2004/08/01 2004/08/31 Rent and se
Ready DEMO-E 2004/08/01 2004/08/31 Rent and se
Ready F-001 2004/08/01 2004/08/31 Service
Ready H-001 2004/08/01 2004/08/31 Service
Ready I-001 2004/07/01 2004/08/31 Rent and se
Ready INV 2004/08/01 2004/08/31 Service
Ready J-001 2004/08/01 2004/08/31 Service
Ready K-001 2004/07/01 2004/08/31 Rent and se
Ready L-001 2004/08/01 2004/08/31 Service
Ready M-001 2004/07/01 2004/08/31 Rent and se
Ready O-001 2004/07/01 2004/08/31 Rent
Ready O-001 2004/08/01 2004/08/31 Service
Close
Edit
Add
Delete
On Hold

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Notes :

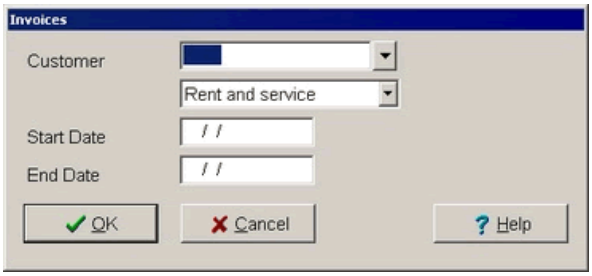
- The actual date appearing on the invoice will be the value you provide during the invoice creation step.
- Accounts that have separate service and storage invoices may appear twice if both storage and service invoices are due to be created.
- If there are no services to be billed, the given invoice will not be create during the invoice creation process.
- The dates reflect the service period, therefore the dates on storage may appear to be incorrect if the customer is billed rent in advance. The invoice itself will be correct.

7. If you wish to modify the selection, follow the steps in the section below. Otherwise, click **Close**.

Editing the selection list

1. From the **Accounting->Invoicing** module, select **Create-> Edit selection list**.
2. Select the building and click **OK**.The invoice selection appears, as seen above.

- To add an invoice, click on the **Add** button. Set the parameters and click **OK**.



- To delete an invoice from the selection, select it (it will appear highlighted) and click on the **Delete** button. It will be removed from the list.
- To edit the parameters for an invoice, select it and click on the **Edit** button. A window similar to the one above appear. Edit the parameters and click **OK**.
- To put an invoice on or off hold, select it and click on the **On Hold** button. The status of the invoice will toggle between "Ready" and "On Hold".

(Placing an invoice on hold will prevent it from being created during the creation step. You may later edit the selection and take it off hold, and repeat the creation step.)

3. When done, click the **Close** button.

Print the selection list

If for some reason you wish to print the selection list, you may do so as follows: especially to verify the list. (Note that this does not print the invoices, just the list of invoices and their status.)

1. Open the **Accounting->Invoicing** module.
2. From the menu, select **Create->Print Selection**.
3. The selection list will be printed to the default printer.

Deleting the selection list

If you wish to create a selection list manually, you may first delete the existing selection list as follows:

1. From the **Accounting->Invoicing** module, select **Create->Erase Selection** from the menu. A dialog box appears.

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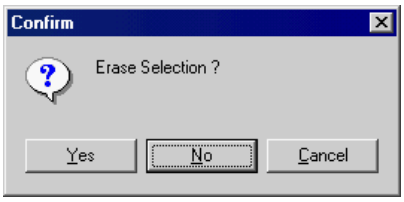


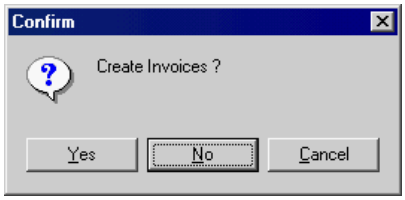
2. Click **Yes** to confirm the deletion. The list will be emptied.

9.7.2.5 Creating or printing invoices with auto-selection

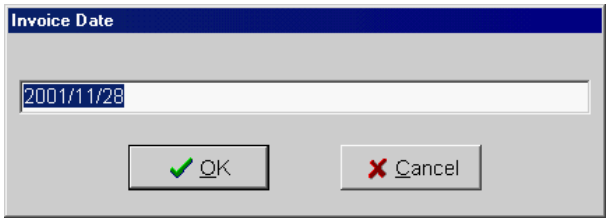
Auto-invoices bill the different service charges (related to deliveries) and/or the rent services (related to storage) for a given period of time. In fact, they are only created for customers included in the selection list, which is why it is very important to determine if the selection list is correct before creating the auto-invoices. (This operation is described in the previous section 695 .)

When the selection is ready, the record center can produce the auto-invoices.

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **Create**->**Create Invoices**. A dialog box appears.



3 Click on the **Yes** button to confirm the operation. A window opens on the screen.



Note : This window displays the last day of the month preceding the current month by default.
When calculating the storage fees, the system will not consider the date manually entered here. Only the current month will be considered. For example, if auto-invoices are created on August 1st and the date is changed for July 31th, the storage fees are charged for the time period starting on August 1st and ending on August 31th.

4 Keep the default date or enter any other date that must appear on the invoice and press **OK**.
5 The system automatically proceeds to the creation of the invoices. The current volume in storage for each customer on the selection list is calculated as well as the charges related to delivery items for the selected period.

Note : The delivery charges can be manually modified before creating auto-invoices in the Delivery Billing 712 module.

***6** The created invoices appear in the current module. In order to be sent to customers, these invoices can be printed by clicking on **Create**->**Print Selection Invoices**.

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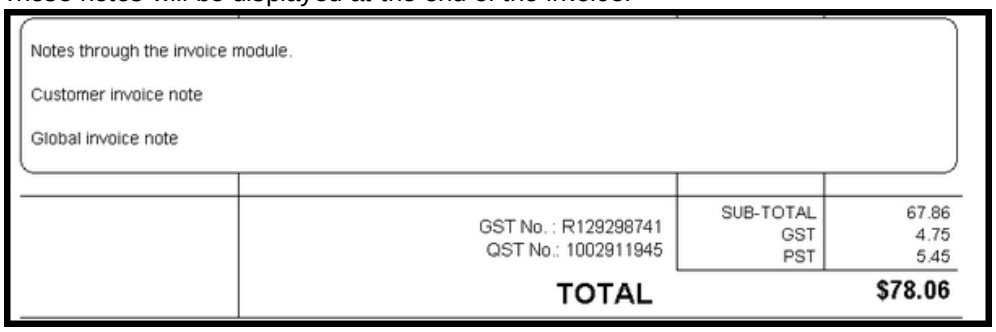
9.7.2.6 Adding notes to an invoice

It is possible to add three types of notes to an invoice. The global invoice note[379] is available to appear on all invoices, whereas the customer invoice note[296] is available for invoices for a specific customer. The third option is to add a note to a specific invoice.

To add a note to an invoice:

1. Open the **Accounting->Invoicing** module, and navigate to the correct invoice.
2. From the menu, select **Edit->Note**.
3. In the box that appears, enter your note, then click **OK**.

These notes will be displayed at the end of the invoice.



To toggle customer or global invoice notes on or off for an invoice:

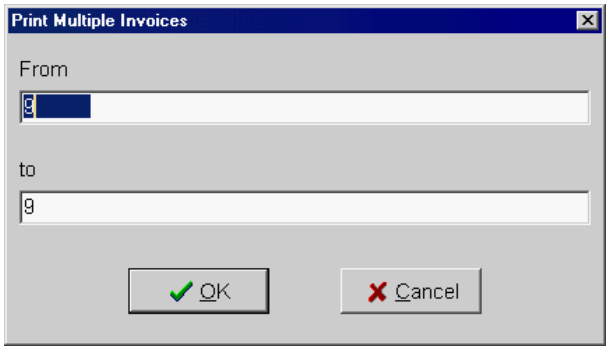
1. Open the **Accounting->Invoicing** module, and navigate to the correct invoice.
2. On the menu, select or deselect **View->Show customer note | Show global note** as desired.

If the check-mark beside the option is cleared, the corresponding note will not appear on the specified invoice.

9.7.2.7 Printing multiple invoices

This operation allows to print many invoices simultaneously (the invoices have to be created first.)

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **File**->**Print Multiple Invoices**. A window appears.



3 Enter the interval of the desired invoice numbers (these numbers appears at the Invoice field of the current module) and press **OK**. The invoices are automatically printed on the default printer.

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9.7.2.8 Positioning the billing address on the invoice

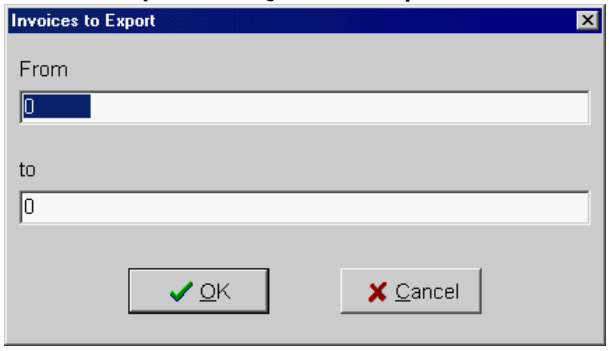
If the default position of the billing address on the invoice is not suited to your envelopes for example, you can change it's positioning on the invoice. This setting is located in the "System Information" module under the billing section:

9.7.2.9 Exporting the invoicing to other billing systems

Invoice information can be exported from EDC in two different formats for import to commercial accounting systems. The QuickBooks format can be imported directly to QuickBooks. A generic text format is also available.

Prior to exporting invoices it is important to configure your system for billing[106], to ensure that the exported data will be recognized by your accounting software.

1. Click on **Accounting->Invoicing** from the Main window.
2. Click on **File->Export->To QuickBooks| To text format**. A window appears.



3. Enter the desired interval of invoices and press **OK**.
4. A window appears, prompting for a file name and directory to export the data to. By default, invoice export files are named "EDC_INV_YYYY_MM_DD", where YYYY_MM_DD is the date on which the invoices were exported. Change the name if desired, then click **Save**.

- If you are exporting for import to QuickBooks, the file will be saved

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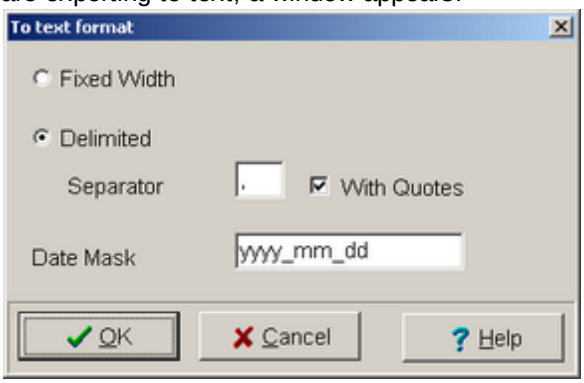
- If you are exporting to text, a window appears:



5. Save the data in the chosen file by following the indications that are displayed on the screen (different for each workstation). The user will have to import the saved file into his new accounting system in order to recover the data.

Related topics:

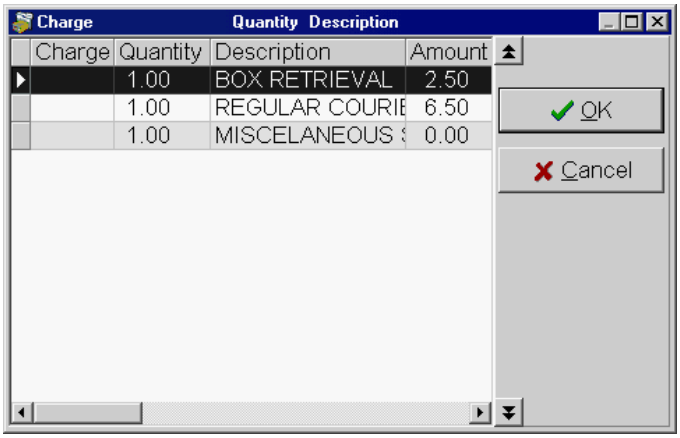
QuickBooks export setup 106

9.7.2.10 Adding, editing, deleting or viewing items of the current invoice

An invoice was just created, manually or by auto-selection, and its items need to be corrected before sending the invoice to the customer. To do so, keep the invoice on the screen or search for another invoice, and perform one of the operations described below.

Viewing the items of the current invoice

1 Click on **Item->View Items** in the Invoicing module. A window appears.



Note : This window displays all the items of the current invoice, including a description, quantity, amount and charge code or department to bill (when customers are billed by charge code or department).

2 Press **OK** when finished.

Adding items to the current invoice

1 Click on **Item->Add Item** in the Invoicing module. A window appears.

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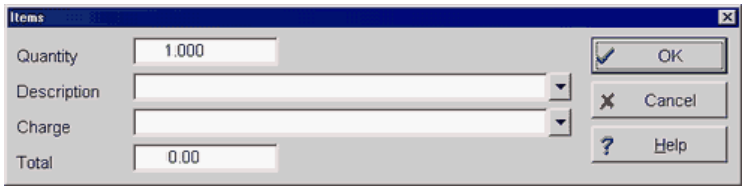
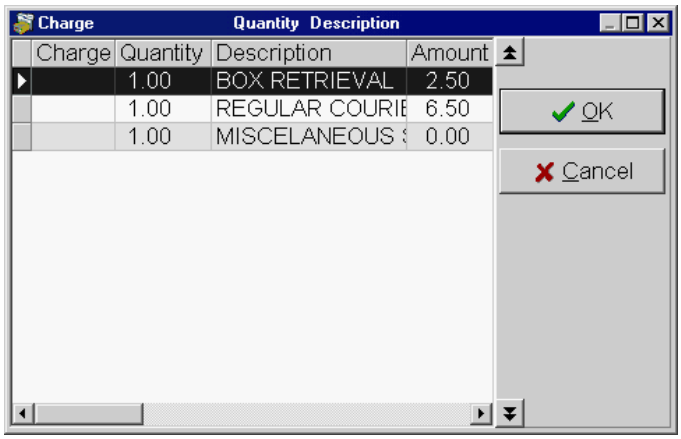


Note : Quantity allows to specify how many items must be added.
Description allows to select an item in the predefined list. This description can be modified according to customer needs.
Charge allows to select the department or charge code to which the item will be billed.
Total automatically indicates the predefined fees related to an item, if such is the case. If not, they can be entered manually.

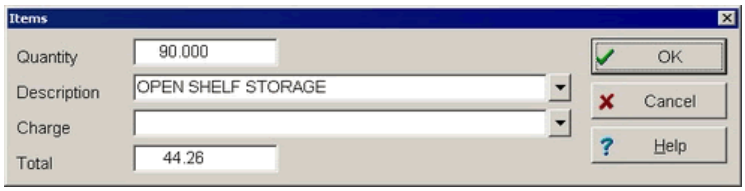
2 Enter the desired information in the appropriate fields and press **OK**. The item will be added to the invoice and its total cost will be adjusted consequently.

Editing the items of the current invoice

1 Click on **Item**->**Edit Item** in the Invoicing module. A window appears.



2 This window contains all the invoice items. Select the desired item (it will appear highlighted) and press **OK**. A window opens.



3 Edit the desired information in the appropriate fields and press **OK**. If it applies, the total cost of the invoice will be corrected consequently.

Deleting items from the current invoice

1 Click on **Item**->**Delete Items**. A window appears.

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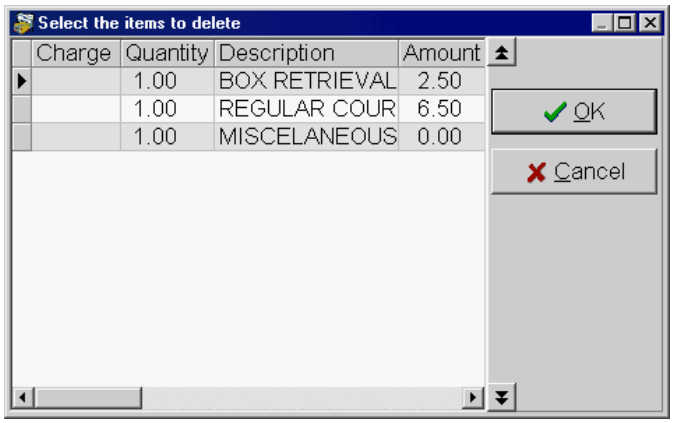

2 Select an item (it will appear highlighted) and press **OK**. The item is automatically deleted from the invoice and the invoice costs are corrected consequently.

9.7.2.11 Viewing or printing reports

The Invoicing module allows to view and print the current invoice, its details and delivery summary.

The invoice will be an exact copy of the final one that will be printed for the customer.
The detailed invoice will show all the fees, classified by department or by charge code (depending on what basis the customer is billed.)
The delivery summary will give the description, the quantity and the cost of each delivery item.

Viewing reports

1 Keep the invoice newly created or any other invoice on the screen.
2 Click on **View**->**Invoice**|**Detailed Invoice**|**Delivery Summary**.
3 The report is displayed soon after, according to the chosen menu item.

Note : One can print the report while viewing it by clicking on the **Print** button. After viewing the report, one can save the report to a file (see Printing an invoice to a file 703).

Printing reports

1 Keep the invoice newly created or any other invoice on the screen.
2 Click on **File**->**Print Invoice**|**Print Detailed Invoice**|**Print Delivery Summary**.
3 The report is automatically printed, according to the chosen menu item.

9.7.2.12 Printing an invoice to a file

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **File**->**Print Invoice to File**. A window appears (the window will be different for every computer).

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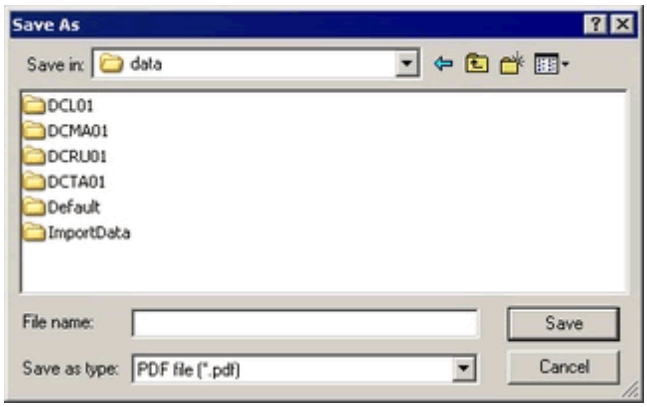
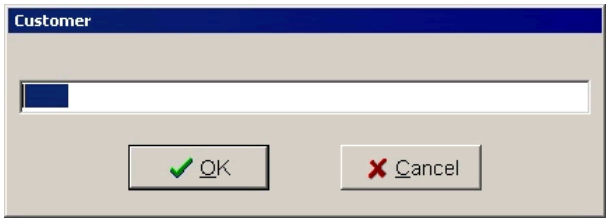


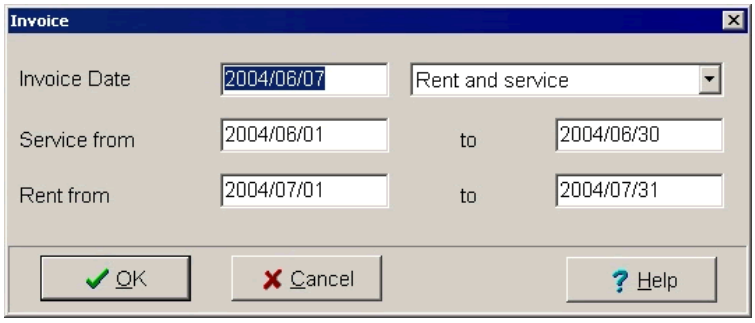
3 Select a file or folder.
4 Select a type (ex: PDF file)
5 Create a file name
6 Press Save

9.7.2.13 Previewing an invoice

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **File**->**Preview Invoice**. A window appears.



3 Select a customer (to have the list of customers press **OK** -- the customer selected will appear highlighted) and press **OK**. A window appears.



4 Select an invoice date.
5 Select the type of invoice in the drop-down field at the right (Rent and Service | Rent | Service).
6 Select a range of dates for the service and the rent.
7 Press the **OK** button. The software will automatically create a preview of the invoice. To print the invoice press **Print** ; to close the preview press **Close**.

Note: The invoice preview should not be sent to a customer.

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9.7.2.14 Previewing invoice totals

Previewing invoicing totals may be part of your monthly invoicing practice (e.g. to help catch any non-configured price codes that have been used), or you may wish to get a sense of your anticipated revenue to date, for all accounts.

This function calculates the invoices based on the current invoice selection and displays the storage total and service total for each account rather than actually creating the invoices.
Note that this function can take a long time to run.

Steps:

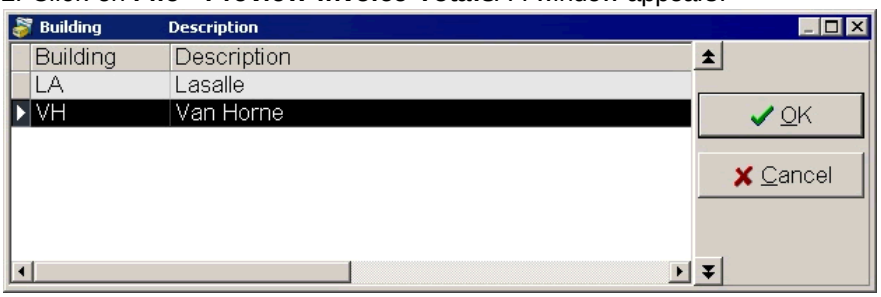
Update your invoice selection.

(Warning: This should only be done after all invoices for the previous billing period have been created and the selection is no longer needed.

- For details, see Creating, editing, printing or deleting selection list for auto-invoicing 695
- When choosing a seed-date for the invoice selection, change the month portion to the following month.

Preview the invoice totals

1. Click on **Accounting**->**Invoicing** from the Main window.
2. Click on **File**->**Preview Invoice Totals**. A window appears.



3. Select a building in the list (it will appear highlighted) and press **OK**.
4. The current storage and service totals for each account will be displayed as a report.
5. To print the preview press on the print icon at the top left of the window.

9.7.2.15 Viewing or exporting commission reports

View the commission report

1. In the **Accounting->Invoicing** module, select **File->Commission Report**. A window appears.

2. Select the salespeople for whom you wish to view commissions, then press **Enter** or click **OK**.
3. Enter the range of invoice dates over which you wish to view commissions, then press **Enter** or click **OK**.

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4. The system will produce a report listing the sales people, commissioned sales totals and commissions per account, and total commissioned sales and commissions per salesperson.

Export the commission report

1. In the **Accounting->Invoicing** module, select **File->Export Commission Report**. A window appears.

2. Select the salespeople for whom you wish to view commissions, then press **Enter** or click **OK**.
3. Enter the range of invoice dates over which you wish to view commissions, then press **Enter** or click **OK**.
4. Select the location and name that you wish to use for saving the export (default name is Commissions.csv), and then click **Save**.
5. Your file will be saved in CSV format, which can be opened with spreadsheet applications or text editors.

Related topics

Enabling and viewing Sales Commissions 301

9.7.2.16 Viewing web licenses soon to be expired

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **File**->**View web licenses that expire soon**. A window appears.

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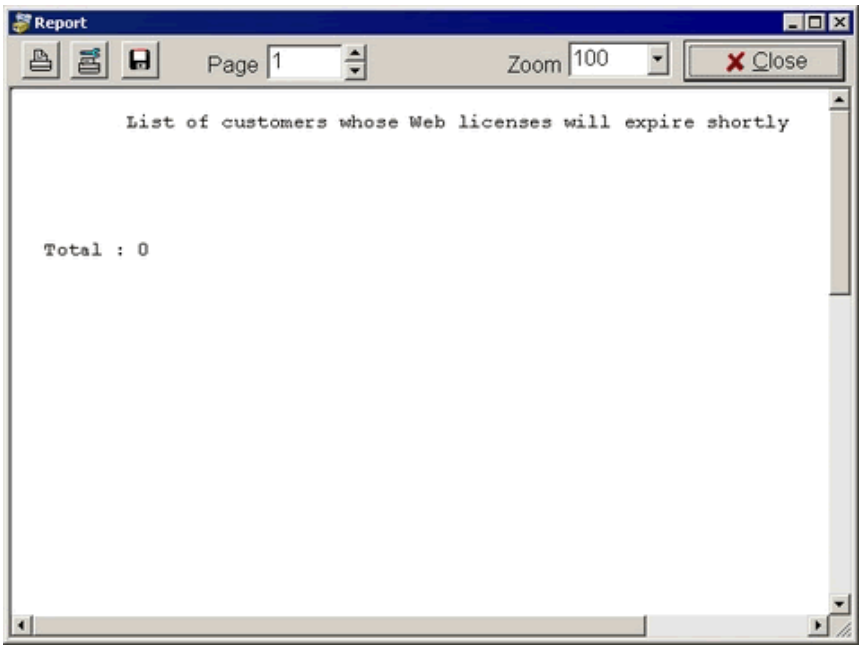

3 To print the preview press on the print icon at the top left corner of the window.

9.7.2.17 Viewing or printing customers excluded from a selection

Viewing items excluded from a selection

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **Create**->**View excluded from Selection**.
3 The preview is automatically created. To print this preview press on the print icon at the top left corner of the window.

Printing items excluded from a selection

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **Create**->**Print excluded from Selection**.
3 The preview is automatically printed.

9.7.2.18 Invoicing with RimsLink

When EDC creates an invoice for a shared customer at the Billing record center, it pulls information from the service record center's database.

As when invoicing any customer, it is important that all deliveries for the billing period be returned, and all boxes be properly sized.

If a delivery is not returned at the service site, a message such as the following appears during invoice creation.

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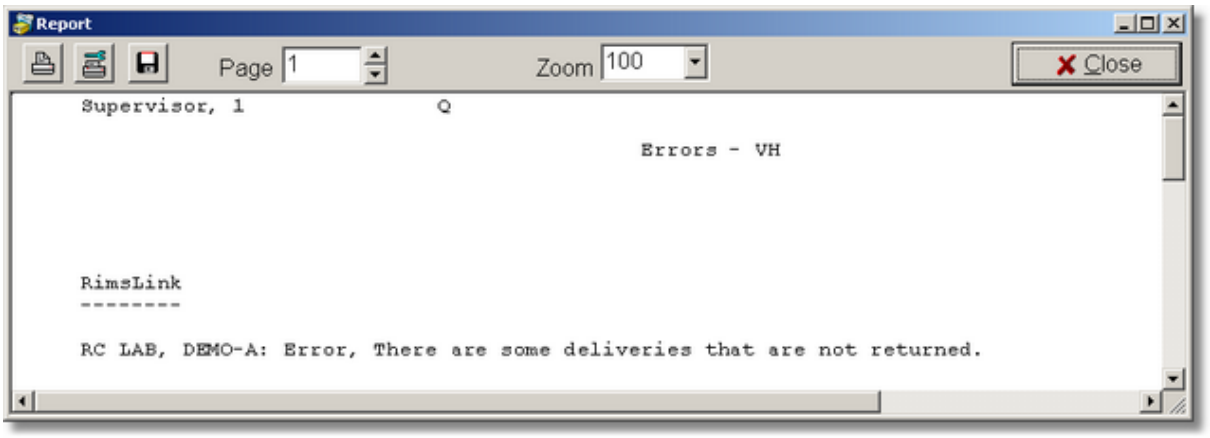
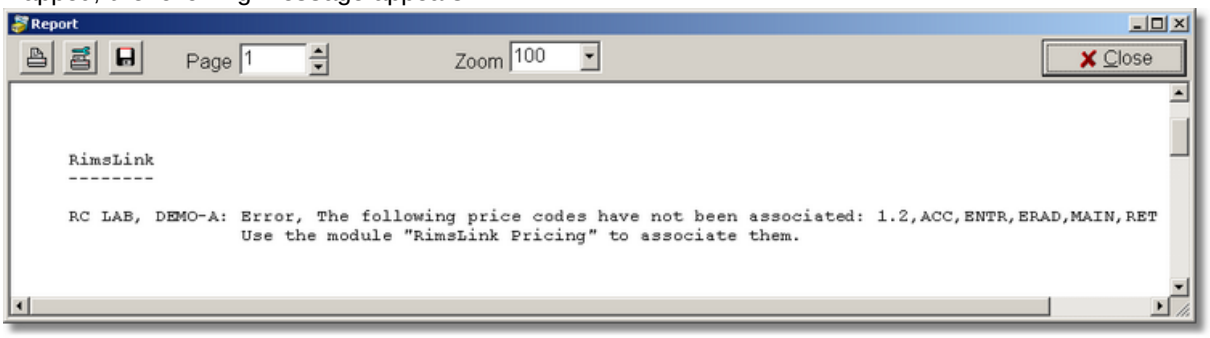
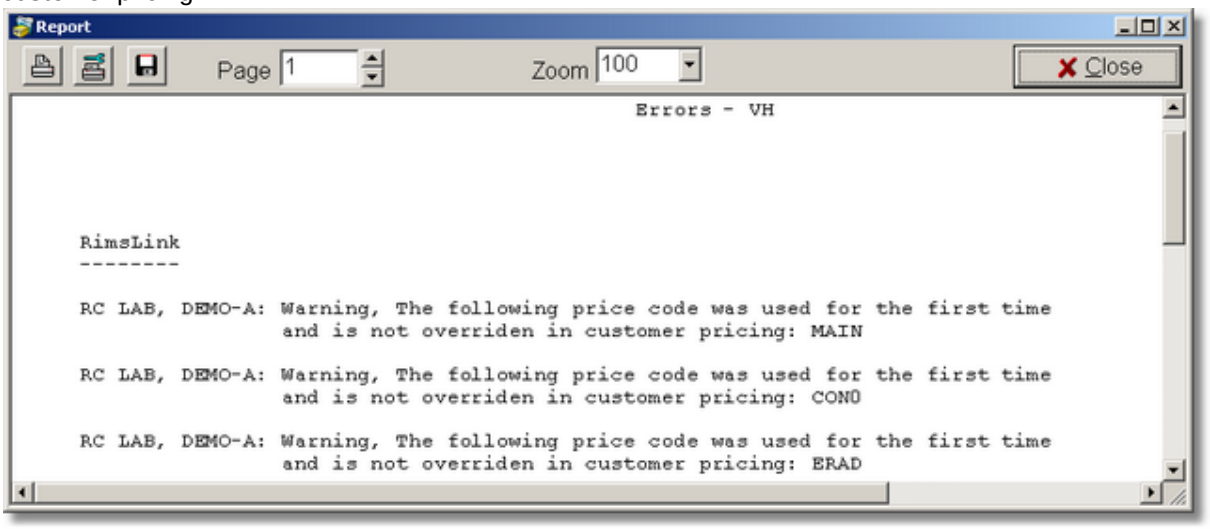


If a shared customer incurs a charge at the service record center with a price code that has not yet been mapped, the following message appears.


Report
Page 1
Zoom 100
Close
RimsLink
RC LAB, DEMO-A: Error, The following price codes have not been associated: 1.2,ACC,ENTR,ERAD,MAIN,RET
Use the module "RimsLink Pricing" to associate them.

When a price code is used for the first time, a message appears if the price code is not overridden in customer pricing.


Report
Page 1
Zoom 100
Close
Errors - VH
RimsLink
RC LAB, DEMO-A: Warning, The following price code was used for the first time
and is not overriden in customer pricing: MAIN
RC LAB, DEMO-A: Warning, The following price code was used for the first time
and is not overriden in customer pricing: CONO
RC LAB, DEMO-A: Warning, The following price code was used for the first time
and is not overriden in customer pricing: ERAD

9.7.2.19 Viewing or printing a list of unbilled customers

This is useful to know if any customers have been forgotten.

1 Click on **Accounting**->**Invoicing** from the Main window.
2 Click on **Create**->**View|Print unbilled customers**.

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3 The preview is automatically created. To print this preview press on the print icon at the top left corner of the window.

9.7.2.20 Creating service only invoices

Service only invoices are useful for clients that only purchase line items (like boxes) and that do not have any items in the inventory. If the customer is set as service only, the previous deliveries will not be charged if they were not invoiced. Note that the delivery must be returned before the invoice can be created.

In order to create service only invoices, a few settings must be defined in the Customer Information module for the specific clients.

1 Edit or define the different fields of the Customer Information module (in the Billing section) for the wanted customer(s).

- The customer must have the option "Service only[253]" set to Yes.
- The "Courier billing" must be set to Delivery.
- The "Hourly rate" must be defined when needed.
- The "Invoice format" must be set (Paper and/or Electronic)
- The "Taxable" field must be set to Yes if the client must be taxed.
- The "Billing building" must be defined.
- A "Renewal date" must be defined (it usually corresponds to the end date of the customer's contract.)
- The "Billing" field can be defined according to customer needs.
- The fields "Bill to" and "Email" need to be defined (the email is only necessary if the "Invoice format" is electronic).
- The rest of the fields from the section can stay as default.

Note: The customers that are set to service only do not appear in the auto selection list even if the "Auto Invoice" option is set to Yes. When periodic invoice items are created for service only clients, the system will not add them automatically to the invoices.

2 Click on **Accounting**->**Invoicing** from the Main window.
3 Click on **Create**->**Create Service Invoices** -> **Customer only | All customers**
4 If you have previously selected **Customer only**, a window appears. Enter the customer key or press **OK** to have the list of customers, select a customer (it

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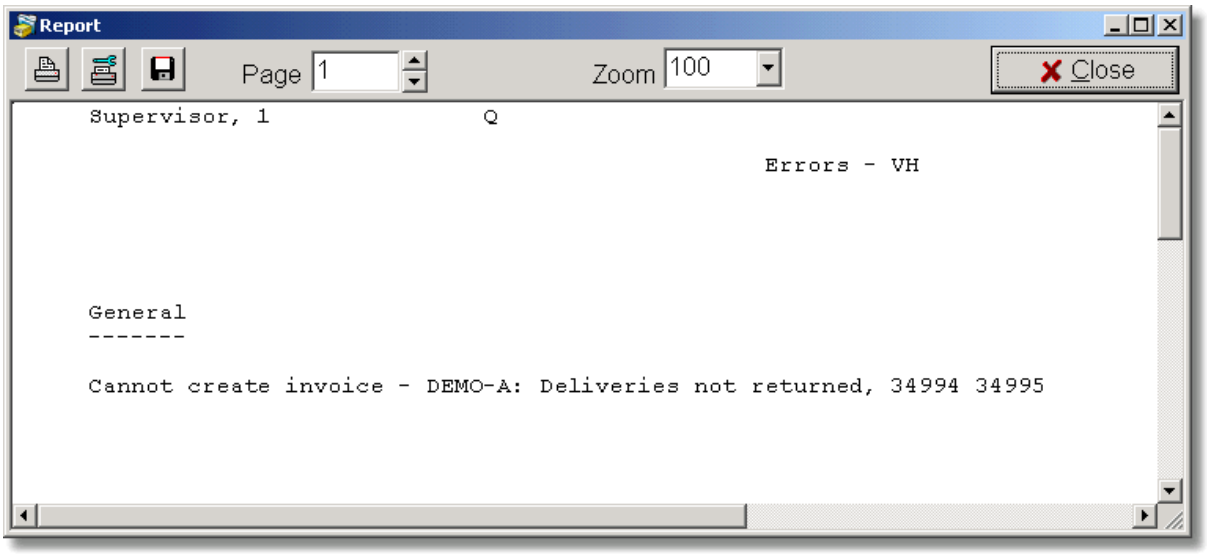

will appear highlighted) and press **OK**.

5 A window appears. Edit the invoice date or leave it as it is, and press **OK**.

6 The system will calculate all the deliveries containing services for the desired customer(s).

7 One or many invoices are created.

9.7.2.21 Editing the layout of an invoice

For a given customer, if the Legacy Invoice[254] setting is set to **No** in the Customer->Customer Information module, the system will format the customer's invoice using a customizable report rather than using the standard invoice layout.

This layout can be defined for the specific invoice[710]. If it is not defined here, the system will check for the default invoice template defined at the customer level[297], then finally at the record center level[380].

To edit the layout of a specific invoice: (Note that changes cannot be saved at this level).

1. Open the **Accounting->Invoicing** module
2. From the menu, select **View->Invoice**. The invoice appear.
3. Click the **Edit** button (which looks like a pencil held over the invoice).
4. The layout of the invoice appears. Make any desired changes.
5. Close the invoice layout window when done.
6. Print the invoice. The changes will be apparent on the invoice

Making changes to the invoice layout (Permanent changes, at customer or record center level).
The interface for editing invoices is the same as the one for editing reports. A full discussion of this utility is beyond the scope of this manual. However, the following may be useful to you:

- You may obtain invoice layouts from DocuData or other sources. To import a layout, select **File->Open** from the menu, browse to the file and click **Open**.
- To move multiple fields, click them while holding **Shift** to select them, and drag them to the desired location. (Or hold the Ctrl button and press the arrow keys.)
- To add an image, click the **image** button on the toolbar, click the desired location on the invoice. **Right-Click** on the box that appears, and from the menu, click **Picture** and navigate to the image that you wish to use. To resize the image, right-click on it again and select the **Stretch** option.
- If you want charges grouped by department or by account (if multiple accounts are on the same invoice), on the menu make sure that **Report->Sort by Department** is selected.

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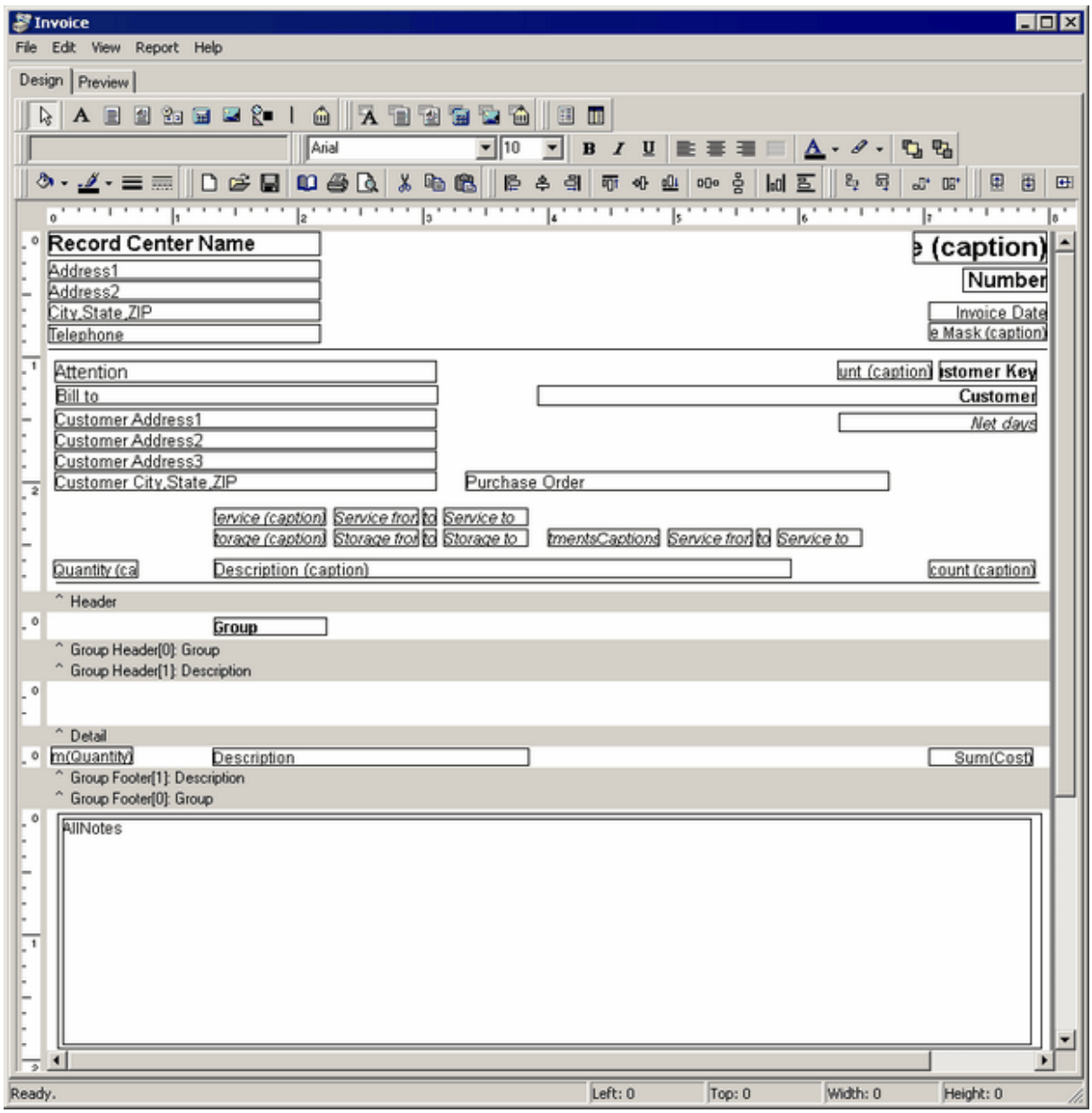
For more details of working with the report builder interface, see Working with the Design tab[505] or our video tutorials.



9.7.2.22 Invoice attachments

***

Invoice attachments are a mechanism for providing your clients with additional information to help them analyze and understand their invoices. By default, we recommend letting your clients know that these attachments are available, but only including the specific attachments that you now they will use.

You can view various potential invoice attachments through the *Accounting->Invoicing* module, and you can instruct EDCRC to include the attachments for a specific account through the *Customer->Customer*

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Information[265] module. For your convenience, here is a summary of the attachments

Detailed Invoice
Provides a breakdown of charges by department or by charge back code. There is a setting in customer information to include each department on a separate page if you wish.

Delivery Summary
This shows a breakdown of service charges by delivery number, showing the delivery number, date, and address, along with any notes added through the return delivery module or delivery billing to explain additional charges.

Out Boxes | Files List
Listing the items that are temporarily out of the record center can help your clients to stay organized and use your services more effectively. This can prompt them to return items that should be returned and mark other items as permanently out.

Authorized users
Including the list of active authorized user profiles can help your clients remember to remove access for users who should no longer be active.

Activity Report
Clients who track their expenses very carefully will find this report useful in reconciling the charges against the activity that happened during the month.

Delivery calendar
This calendar shows scheduled and past delivery dates (6 months each way) is included with the invoice. This can prompt your users to adjust their schedules for tapes or shredding if necessary, preventing your drivers from showing up on a date when the client is closed and unable to receive deliveries.

Excel box listing
Smaller accounts with electronic invoicing might like to receive a PDF listing of their boxes with each invoice, especially if they are inactive and only invoiced yearly.

9.7.3 Delivery Billing

9.7.3.1 Overview (Delivery Billing)

The delivery billing module permits you to review and modify charges on deliveries, so that any corrections or changes will be accurately captured upon invoice creation. It is worth noting that deliveries are automatically created for certain operations such as changing the cardboard of a box if it is billable, and that operations performed without a delivery are not automatically billed.

Available reports
- daily, weekly, monthly or annual statistics of items (for one or for all customers)[720]
- daily, weekly, monthly or annual delivery statistics (for one or for all customers)[720]
- integrity of quantities for delivered items[720]

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Fields

- None

Tasks

- Choosing a delivery to activate the module 714
- Viewing some components of the current delivery 715
- Viewing the summary of delivery charges 716
- Viewing the summary of delivery items, either by department or charge code 716
- Deleting charges associated to returned or delivered items 716
- Editing quantities of returned or delivered items 717
- Adding predefined notes to a delivery and editing their content 717
- Canceling or restoring all delivery charges 718
- Adding extra services to a delivery 718
- Removing items from a delivery 719
- Viewing or printing some statistics 720

Distinctive menu options:

File menu

- Select delivery 714

View menu

- Orders 715
- Order items 715
- Return items 715
- Courier quantities 715
- Delivery notes 715
- Charge summary 716
- Departmental summary 716
- Charge back summary 716

Edit menu

- Order items 716
- Return items 716
- Courier quantities 717
- Delivery notes 717
- Cancel all charges 718
- Restore all charges 718
- Add line items 718
- *** Add on site purge to return 719
- *** Add off site purge to return 719
- Remove item 719
- Change delivery type 722

Module window:

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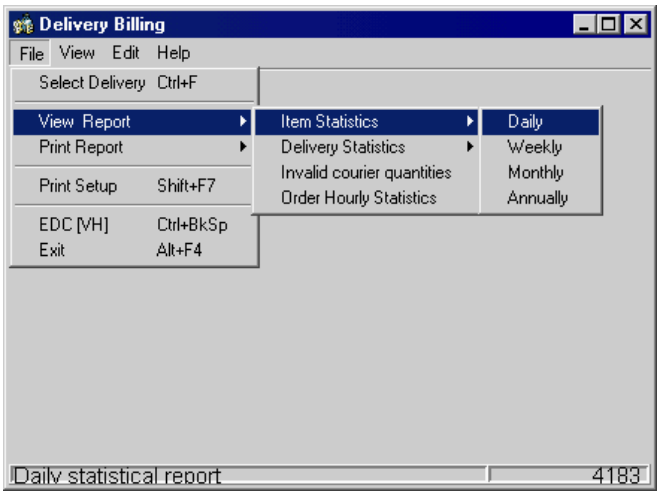
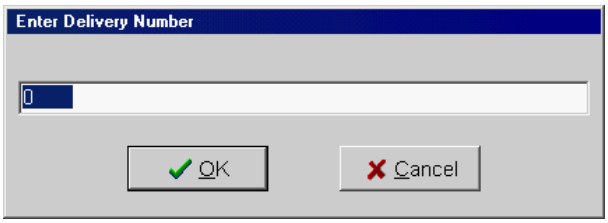


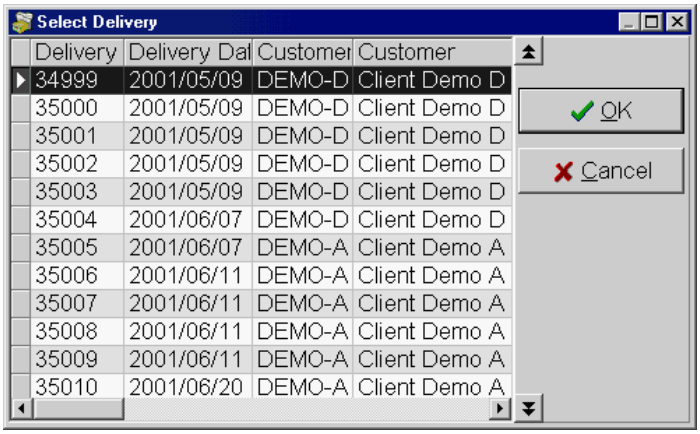
9.7.3.2 Choosing a delivery to activate the module

When opening the Delivery Billing module, only the File and Help menus are available. To activate the other menus it is necessary to choose a delivery to which subsequent operations are performed in the current module.

1 Click on **Accounting**->**Delivery Billing** from the Main window.
2 Click on **File**->**Select Delivery**. A window appears.



3 Enter the desired delivery number and press **OK**. If the entered number does not exist, a new window opens.


Select Delivery
Delivery
Delivery Dal
Customer
Customer
34999 2001/05/09 DEMO-D Client Demo D
35000 2001/05/09 DEMO-D Client Demo D
35001 2001/05/09 DEMO-D Client Demo D
35002 2001/05/09 DEMO-D Client Demo D
35003 2001/05/09 DEMO-D Client Demo D
35004 2001/06/07 DEMO-D Client Demo D
35005 2001/06/07 DEMO-A Client Demo A
35006 2001/06/11 DEMO-A Client Demo A
35007 2001/06/11 DEMO-A Client Demo A
35008 2001/06/11 DEMO-A Client Demo A
35009 2001/06/11 DEMO-A Client Demo A
35010 2001/06/20 DEMO-A Client Demo A
OK
Cancel

Note : This window contains all the deliveries registered in the system since the beginning of the activities for the record center.

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4 Select the desired delivery (it will appear highlighted) and press **OK**.

Note : The number of the selected delivery is displayed on the right bottom corner of the module.

5 The **View** and **Edit** menus are now available. All the connected operations can be performed for the selected delivery. During process, it is possible to choose another delivery by repeating steps **2** to **4**.

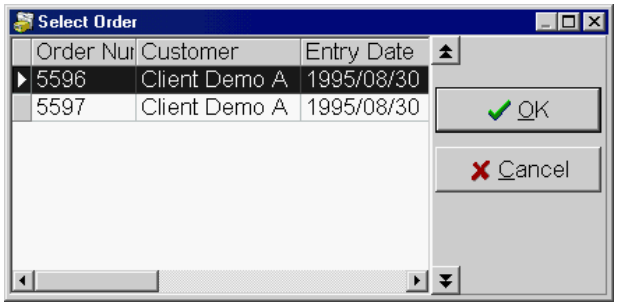
Note : An error message is displayed when choosing a delivery that is not returned yet, but the menus are activated anyways.

9.7.3.3 Viewing some components of the current delivery

A delivery was chosen (see the previous section 714). It is now possible to view the components of the current delivery.

Viewing orders

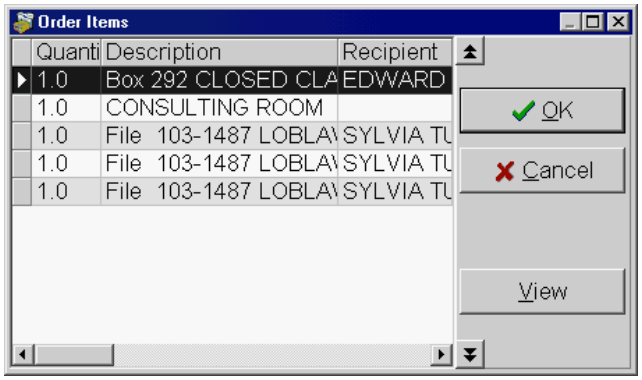
1 Click on **View**->**Orders** in the current module. A window appears.



2 This window shows all the orders grouped on the delivery. Press **OK** when finished.

Viewing delivered items

1 Click on **View**->**Order Items** in the current module. A window appears.



2 This window displays all the items delivered to the customer. Press **OK** when finished.

Viewing returned items

1 Click on **View**->**Return Items** in the current module. A window appears and displays a list of all the items returned on the delivery.

2 This window shows all the items returned on the delivery. Press **OK** when finished.

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Viewing courier quantities

1 Click on **View**->**Courier Quantities** in the current module. A report appears and indicates the quantity of courier shipped or returned.

2 Click on the **Close** button of the report's window when finished.

Viewing delivery notes

These notes are the ones added on the delivery in the current module (see "Adding predefined notes to a delivery and editing their content 717 ").

1 Click on **View**->**Delivery Notes** in the current module. The report is automatically displayed.

2 Click on the **Close** button to end the viewing.

9.7.3.4 Viewing the summary of delivery charges

1 Click on **Accounting**->**Delivery Billing** from the Main window.

2 Choose a delivery (see "Choosing a delivery to activate the module 714 ").

3 Click on **View**->**Charge Summary**. A report's window appears and gives a list of the item types on the invoice, including the quantity, the unit cost and the total amount that is billed.

9.7.3.5 Viewing the summary of delivery items, either by department or charge code

This operation is not effective all the time. The menu items Charge Back Summary and Departmental Summary are only active for customers billed by charge back or by department (settings of the Customer Information module). For customers billed on a regular basis, none of these menu items are active.

1 Click on **Accounting**->**Delivery Billing** from the Main window.

2 Choose a delivery (see "Choosing a delivery to activate the module 714 ").

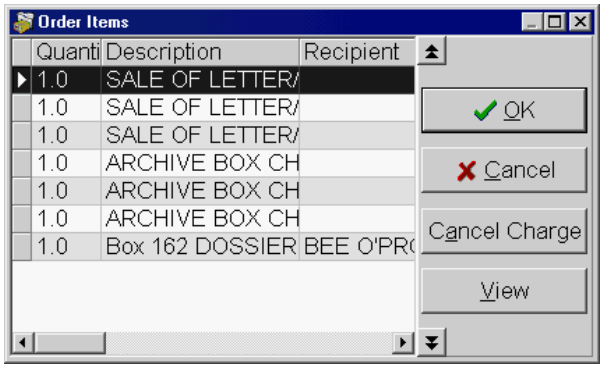
3 Click on **View**->**Departmental Summary**|**Charge Back Summary**. The report's window appears and shows a summary of delivery items, including the quantity, the unit cost and the total amount that is billed, either for each department or charge code.

9.7.3.6 Deleting charges associated to returned or delivered items

1 Click on **Accounting**->**Delivery Billing** from the Main window.

2 Choose a delivery (see "Choosing a delivery to activate the module 714 ").

3 Click on **Edit**->**Order Items**|**Return Items**. A window appears.



Note : A delivery does not always contain return or delivery items. That is why a message can appear, instead of this window, and can indicate that there is no item in the selection.

4 Select an item (it will appear highlight) and click on the **Cancel Charge** button. The related charges will be automatically removed from the total amount billed for the delivery.

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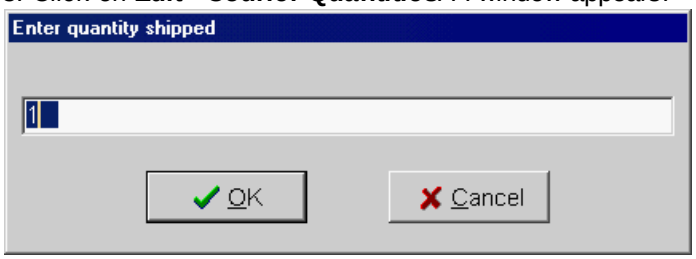
Note : This operation has an impact on the charge summary. Furthermore, a small mark appears in front of the selected item.

9.7.3.7 Editing quantities of returned or delivered items

Use this function with caution.

This function was provided to smooth the transition between EDCRC version 5 where item handling with the container courier billing method had to be entered manual, and version 6 where the calculation started being based on the quantity of bar coded transport containers shipped. It should not be necessary to use this function during normal operations. With this functions, the total costs will be calculated correctly, but under some circumstances the lines in the charge summary may appear incorrectly.

1. Click on **Accounting**->**Delivery Billing** from the Main window.
2. Choose a delivery (see "Choosing a delivery to activate the module 714 ").
3. Click on **Edit**->**Courier Quantities**. A window appears.

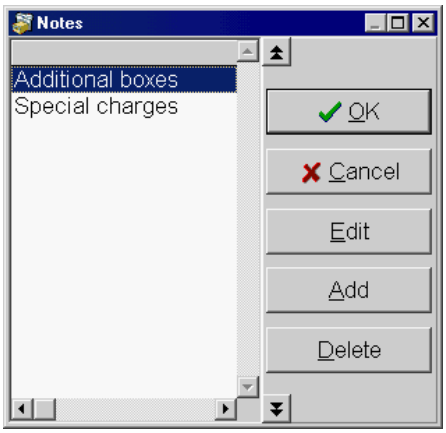


4. Enter the desired quantity of return or delivery items and press **OK**. The system updates the courier quantities.

9.7.3.8 Adding predefined notes to a delivery and editing their content

Some notes can be added to a delivery, especially to justify the adjustment of delivery charges. The notes are predefined in the System Information module (see "Adding, editing or deleting the notes for deliveries 377") and can be modified here. These changes only apply to the current delivery and do not modify the original content of the notes in the System Information module.

1 Click on **Accounting**->**Delivery Billing** from the Main window.
2 Choose a delivery (see "Choosing a delivery to activate the module 714 ").
3 Click on **Edit**->**Delivery Notes**. A window appears.



Note : This window displays the title of the predefined notes

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4 Select a title and press **OK**. A report window appears.
5 Edit the text if so desired and press **OK** when finished.

9.7.3.9 Canceling or restoring all delivery charges

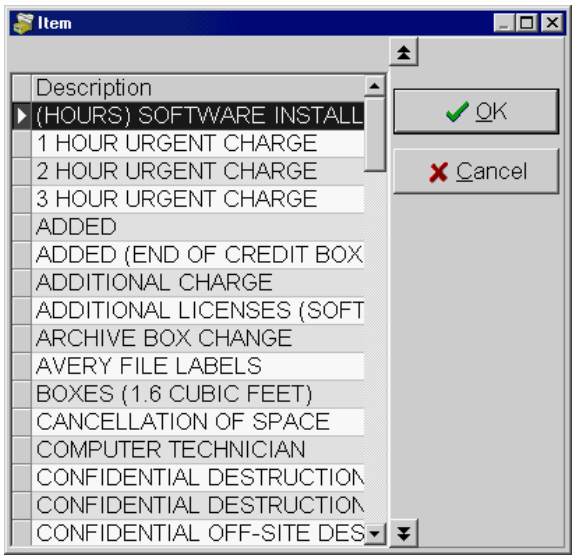
This operation allows to cancel or restore all the charges of a delivery. It can be useful for rush deliveries that were delivered late or for deliveries that are not supposed to be billed to a customer according to certain terms in the contract.

1 Click on **Accounting**->**Delivery Billing** from the Main window.
2 Choose a delivery (see "Choosing a delivery to activate the module 714 ").
3 Click on **Edit**->**Cancel All Charges**|**Restore All Charges**. A window appears and asks to confirm the operation.
4 Click on the **Yes** button to do so. When canceling all the charges, the charge summary produced later will be empty and will indicate a nil balance.

9.7.3.10 Adding extra services to a delivery

When delivering items, unforeseeable events occur sometimes. When picking up boxes on the 5th floor of a customer's office, the elevator could be broken. So the driver will have to go up and down the stairs with the boxes. In that situation, the record center may charge additional labor to the customer.

1 Click on **Accounting**->**Delivery Billing** from the Main window.
2 Choose a delivery (see "Choosing a delivery to activate the module 714 ").
3 Click on **Edit**->**Add Line Item**. A window appears.



4 Select an item (it will appear highlighted) and press **OK**. A window appears and allows to select the department that will be charged.
5 Select the desired department and press **OK**. The system automatically updates the charge summary for the delivery.

Note : The department choice only applies for customers billed by department and for whom the billing parameters are set consequently in the Customer Information module.

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9.7.3.11 Adding shredding purge items to a return

Note: This is a maintenance operation that permits you to adjust purge deliveries (On site and off site shredding) after the delivery has been created and performed. This can be useful for handling exceptional cases, but it bypasses standard work flow and can lead to incorrect data if you are not careful. The best way to handle this is generally to have your drivers make the adjustments immediately via rcMobile[226], where the client can immediately confirm that the service was performed as specified in the receipt that they are sent by e-mail.
***

To add purge items to a return:

1. Open the **Accounting->Delivery Billing** module.
2. Select the correct delivery, selecting **File->Select Delivery** from the menu (**Ctrl-F**) and entering the delivery number.
3. From the menu, select **Edit->Add [on|off] site purge to the return**.
4. The list of purge items of the desired type available at your record center will appear. Highlight the desired one and click **OK**.
5. Enter the quantity to add, then press **Enter** or click **Okay**.
6. You will have the option to select from a list of prepared delivery notes available at your record center. Select an option or click **OK**, or click Cancel.
7. You will have the option to modify the notes. Click **OK** when done.

Your charges will be added, which you can confirm by viewing the charge summary[716] if you wish. The notes that you added will be visible to the client on the delivery summary invoice attachment[711].

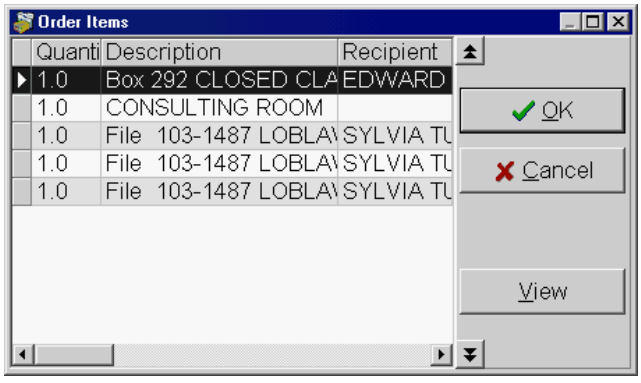
9.7.3.12 Removing items from a delivery

In another operation performed in this module, it was possible to edit an item and to cancel the related charges without deleting the item from the delivery slip, from the charge summary or the list of ordered items. The current operation deletes the charges as well as the item.

1 Click on **Accounting**->**Delivery Billing** from the Main window.

2 Choose a delivery (see "Choosing a delivery to activate the module[714] ").

3 Click on **Edit**->**Remove Item**. A window appears.



Note : This window displays the list of all the order items.

4 Select the item to be removed and press **OK**. A dialog box appears and asks to confirm the operation.

5 Click on the **Yes** button to do so. The system automatically updates the order items.

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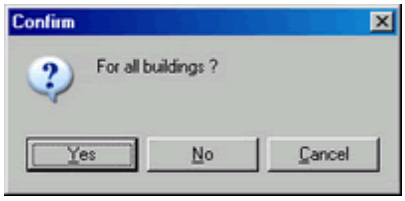
9.7.3.13 Viewing or printing some statistics

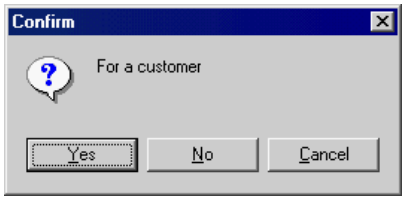
Item statistics
This report indicates the quantity of each product or service (order item) ordered during a given time period, either daily, weekly, monthly or annually.

1 Click on **Accounting**->**Delivery Billing** from the Main window.
2 Click on **File**->**View Report**|**Print Report**->**Item Statistics**->**Daily**|**Weekly**|**Monthly**|**Annually**
A dialog box appears.



To have a report that gives statistics for both buildings, press Yes. To have statistics for a specific building, press No. To abort the report, press Cancel. If you have pressed No, the system will prompt you to choose a building; select one (it will appear highlighted) and press **OK**.

Another window appears.

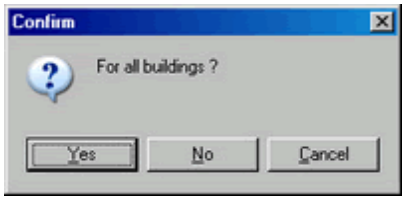


3 To have a report that gives statistics for a specific customer, press Yes. To have statistics for all customers, press No. To abort the report, press Cancel. If you have pressed No, the system will prompt you to choose a customer; select one (it will appear highlighted) and press **OK**. A window appears and allows to specify a time period.

4 Enter a range of dates and press **OK**. The report is printed or displayed soon after.

Delivery statistics
This report gives the quantity of deliveries performed for a specific courier type (regular, urgent, etc) and during a given time period, either daily, weekly, monthly or annually.

1 Click on **Accounting**->**Delivery Billing** from the Main window.
2 Click on **File**->**View Report**|**Print Report**->**Delivery Statistics**->**Daily**|**Weekly**|**Monthly**|**Annually**.



To have a report that gives statistics for both buildings, press Yes. To have statistics for a

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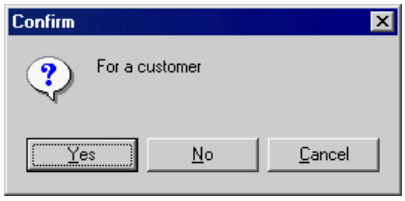
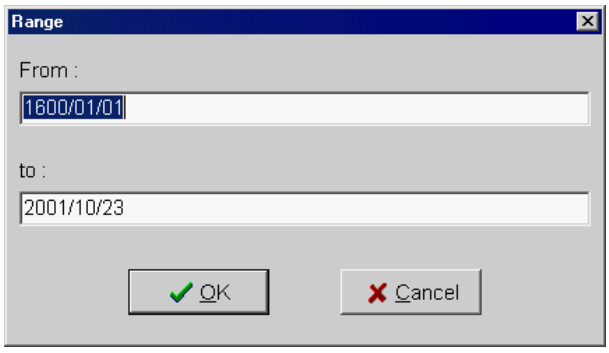
specific building, press No. To abort the report, press Cancel. If you have pressed No, the system will prompt you to choose a building; select one (it will appear highlighted) and press **OK**.

Another window appears.



3 To have a report that gives statistics for a specific customer, press Yes. To have statistics for all customers, press No. To abort the report, press Cancel. If you have pressed No, the system will prompt you to choose a customer; select one (it will appear highlighted) and press **OK**. A window appears and allows to specify a time period.



4 Enter a date range and press **OK**. The report is automatically printed or displayed.

Statistics of invalid courier quantities
This report gives, for a given time period, the quantity of invalid courier on deliveries. For example, it can be a delivery on which there are more order items than delivery items.

1 Click on **Accounting**->**Delivery Billing** from the Main window.
2 Click on **File**->**View Report**|**Print Report**->**Invalid courier quantities**. A window appears and asks to choose a time period.
3 Enter an range of dates and press **OK**. The system automatically produces the report.

Statistics of order hours
This report allows to know, for a given time period and courier type or all courier types, the statistics of orders for all the customers or one customer, either by order hour or delivery hour.

1 Click on **Accounting**->**Delivery Billing** from the Main window.
2 Click on **File**->**View Report**|**Print Report**->**Order Hourly Statistics**. A window appears.

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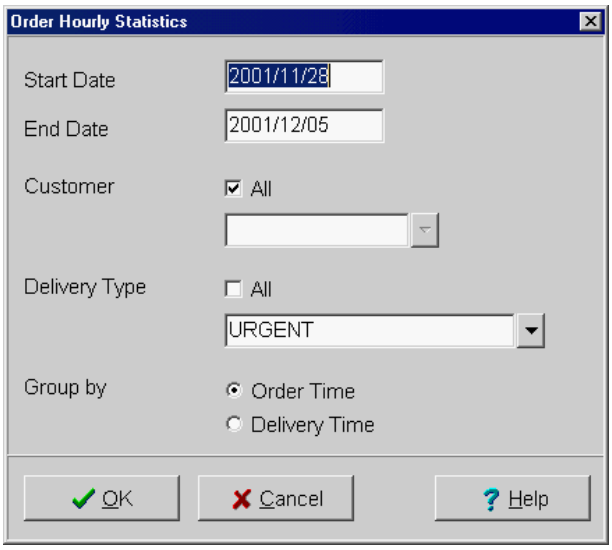

Start Date, End Date : allows to select the range of dates for which the report is produced.
Customer : when this box is checked off, the system must consider the orders of all the customers. If not, it is necessary to click on the drop-down button and to select a specific customer.
Delivery Type : this field is like the previous one. According to the chosen option, the report will be produced for all the delivery types or for a specific delivery type.
Group by : this field allows to specify if the statistics must be produced according to the order hour or the delivery hour.

3 Set the desired parameters in the appropriate fields and press **OK**. The system automatically produces the report.

9.7.3.14 Changing the delivery type

It may occasionally be necessary to change the delivery type of a delivery for billing purposes.

1. Click on the **Accounting->Delivery Billing** module from the Main Window
2. Click on **Edit->Change Delivery Type**. A list of delivery types available to that customer appears (including those types identified as record center-only)
3. Select the desired delivery type and click **Okay**. The delivery type has been changed.
4. From the menu, select **View->Charge Summary**, to verify that the desired outcome has been achieved.

9.7.4 Delivery Type

9.7.4.1 Overview (Delivery Type)

When placing an order in the system, the delivery type will affect how the delivery is scheduled, delivered, and billed. The delivery type module enables you to configure these delivery types.

Available reports

- List of delivery types

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Fields[723] (see the next section)

Tasks

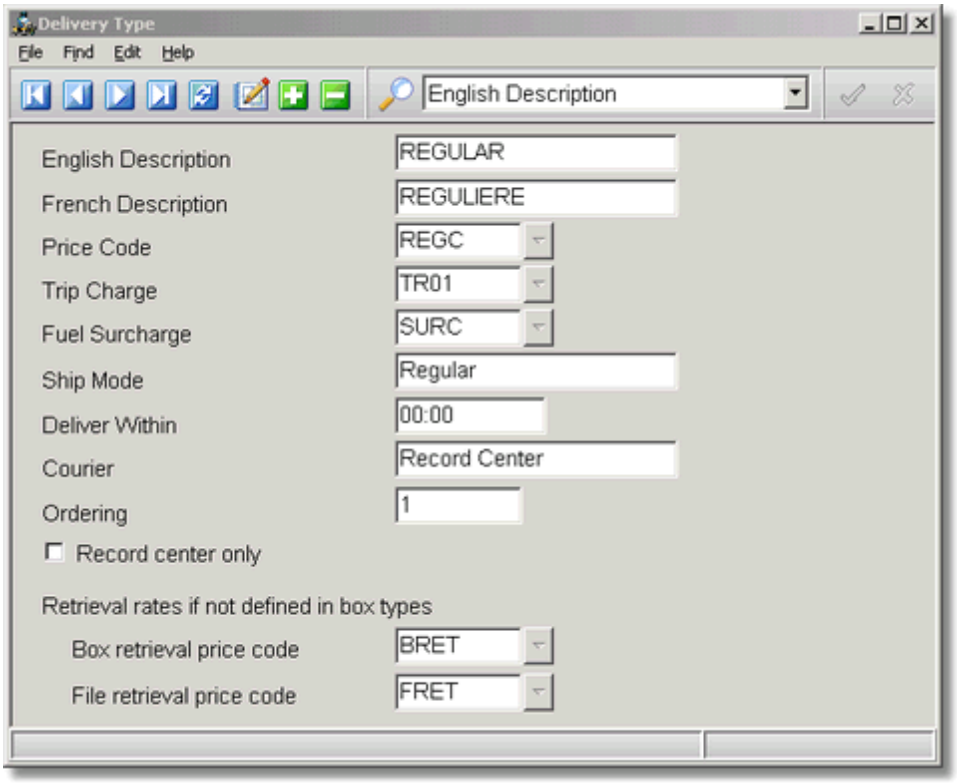
- Adding or editing a delivery type[725]
- Deleting a delivery type[726]
- Viewing or printing the list of all delivery types[727]

Distinctive menu options:

Edit menu

- Associate to multiple customers[726]

Module window



9.7.4.2 Fields (Delivery Type)

English Description

Field that allows to enter the English description of the delivery type
This description will appear everywhere in the system if the selected display language is English (ex: in the choice list of delivery types when placing orders).

French Description

Field that allows to enter the French description of the delivery type. This description will appear everywhere in the system if the selected display language is French (ex: in the choice list of delivery types when placing orders).

Price Code

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Drop-down field associated to a list defined in the General Pricing module.

For physical deliveries, how this is applied depends on the courier billing method that the account is set to use.

Delivery: Applied once per delivery
Container: Applied once per outgoing container, based on the manually entered number
Item: Applied once per outgoing item
Item round trip: Applied once per item, both outgoing and incoming.

For electronic delivery methods (Fax and Imaging), this is the "Per page" charge.

Return price code

Drop-down field associated to a list defined in the General Pricing module.
Similar to the above price code, this is applied once per incoming item when courier billing is set to Item, and once per incoming container when set to Container.

Trip Charge

Drop-down field for assigning a price code defined in general pricing.
This price code is applied once per delivery. It is possible to specify a number of items to include[738] free in the trip charge. This does not apply if courier billing[253] is set to Container or Delivery. If all items are excluded from a delivery and there are no line items or returning items, the trip charge will not be applied.

Fuel Surcharge

Drop-down field for assigning a price code defined in general pricing.
This price code is applied once per delivery. You may modify the dollar amount of this price code frequently to reflect current fuel prices. If all items are excluded from a delivery and there are no line items or returning items, the fuel surcharge will not be applied.

Ship Mode

Choice field that can contain values "Regular", "By date", "By Time", "24 Hours" or "Half day rush".

This field determines when the order items are to be delivered. The delivery delays associated to each ship mode are an internal part of the system. The only exception is the ship mode "By Time" since the delay must be set in the next field.

Deliver Within

Numeric field effective only when the previous field is set to "By Time".
This field allow to specify a maximum time period when the order items have to be delivered to the customer.

Courier

Choice field that can contain values "Record Center", "External", "Fax", "Imaging","On site shred", and "Off site shred".
This will determine what type of items you can add to an order and how the service is actually delivered to the client.

Record Center : the order items are delivered to the customer by the record center's driver.
External : the customer will send his own driver to the record center to pick up the order items.
Fax: the order items are sent by fax to the customer.
Imaging: the order items are sent electronically through the imaging module.
On site shred: *** The client wants you to confidentially shred material for them at their site. This type of

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request must obviously be performed using a vehicle that has shredding capabilities, and you must schedule enough time to complete the work before continuing to the next site. See Processing an order for On Site or Off Site shredding[593] for more details. Since on site shredding is generally more expensive that off site, each has its own separate list of price codes for services that can be added to these orders.
Off site shred: The main purpose of this courier method is to collect material for shredding that does not occur at the client site. Other properties are similar to On site shred.

Destruction certified: This setting applies to *On site shred* and *Off site shred* courier methods and affects the wording on the certificate of destruction. If this check box is selected, the certificate will include the contents of dictionary string[852] 5915, otherwise it will not.

*Ordering
Choice field that can contain values "1" to "65535" inclusive.
This field allows to specify the position of the delivery type in the choice list that appears when placing orders in the Order module.

Note: The delivery types for withdrawals lists (Ship mode - Regular and Courier - External) and the default delivery type for automatically scheduled orders (Ship mode - By Date and Courier - Record Center) can be specified in the options section of the Management->System Information[370] module. .

Record center only
This check box prevents this delivery type from being available for the client to select themselves through ActiveWeb or ActiveFile. Common examples include *no-charge* delivery types as well as reboxing and record center work.

Retrieval rates if not defined in box types

Box retrieval price code
Drop-down field associated to a list that is part of the internal parameters of EDC.
This field determines the charge associated to the retrieval of a box for that delivery type.

File retrieval price code
Drop-down field associated to a list that is part of the internal parameters of EDC.
This field determines the charge associated to the retrieval of a file for that delivery type.

Specific days only
When this option is selected, if the ship mode of this delivery type is Regular, deliveries of this type will only be scheduled for valid delivery days that fall on the days of the week specified.

For example, if a regular delivery would normally be scheduled for Monday, but the delivery type is specific for Tuesday, it will be scheduled for the next Tuesday which is a valid delivery date.

9.7.4.3 Adding or editing a delivery type

1. Click on **Accounting->Delivery Type** from the Main window.
2. Click on **Edit->Add** to add a new delivery type, or browse to the correct delivery type and click **Edit->Edit** to edit and existing one.
3. Enter or modify the desired information in the appropriate fields (see the previous section[723] for more details).
4. Click on the **Accept** button to save the addition or the modifications.

You may then want to associate the delivery type to multiple customers[726] .

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Note: Some delivery types are required by the system.

Deliveries created by the Rotation Schedule[493] will use the delivery type with the following parameters:

- Ship mode: By date
- Courier : Record center
- This is assigned as the Scheduled order delivery type in the System Information module[370]

Deliveries created for destruction will use the delivery type with the following parameters:

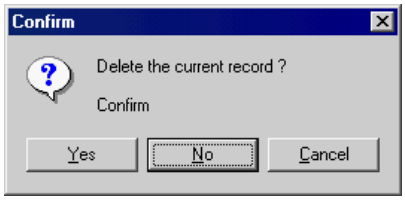
- Ship mode: Regular
- Courier: External
- This is assigned as the Withdrawal list delivery type in the System Information module[370]

9.7.4.4 Deleting a delivery type

It is not recommended to delete a delivery type because the operation cannot be undone and deletes all the data related to the delivery type. It could cause some problems if a customer needed explanations about an invoice, especially if it was related to an old delivery type that was deleted from the system.

One of the only reasons that could justify the deletion of a delivery type is if the delivery type is not frequently used or not used at all. Some statistic reports produced in the Delivery Billing module can help to evaluate how often it is used.

1 Click on **Accounting**->**Delivery Type** from the Main window.
2 Search the desired delivery type and when it is on the screen, click on **Edit**->**Delete**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion.

9.7.4.5 Associate delivery type to multiple customers

This operation will make the selected delivery type available to multiple customers in one operation. Note that it will be necessary to make these available to any authorized user who requires them but is not part of a user group that has access to All delivery types.

1. Open the **Accounting->Delivery Type** module
2. Navigate to correct delivery type
3. From the menu select **Edit->Associate to multiple customers**. A window appears.

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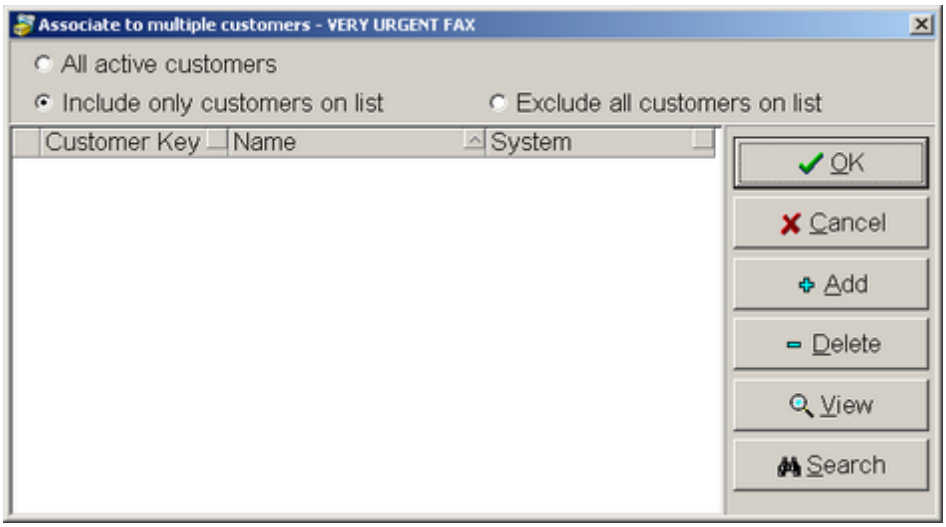

4. Select which customers to associate the delivery type to, then click the **OK** button.

9.7.4.6 Viewing or printing the list of all delivery types

1. Click on **Accounting->Delivery Type** from the Main window.
2. Click on **File->View report|Print report**. The list of delivery types appears on a report's window or is printed on the default printer.
3. Click on the **Close** button to end the viewing.

9.7.5 Box Type

9.7.5.1 Overview (Box Type)

The Accounting->Box Type module permits record centers to flexibly assign price codes to different storage and handling services base on the type of box (or tape). If a customer has the option uses box types[253] set to No, they will be billed based on the assigned volume of the box and various required price codes[741].

Available reports

- List of all the box types

Fields[728] (see the next section)

Tasks

- Adding or editing a box type[731]
- Deleting a box type[733]
- Viewing or printing the list of all box types[733]

Distinctive menu options:

Edit menu

- Copy and add[733]

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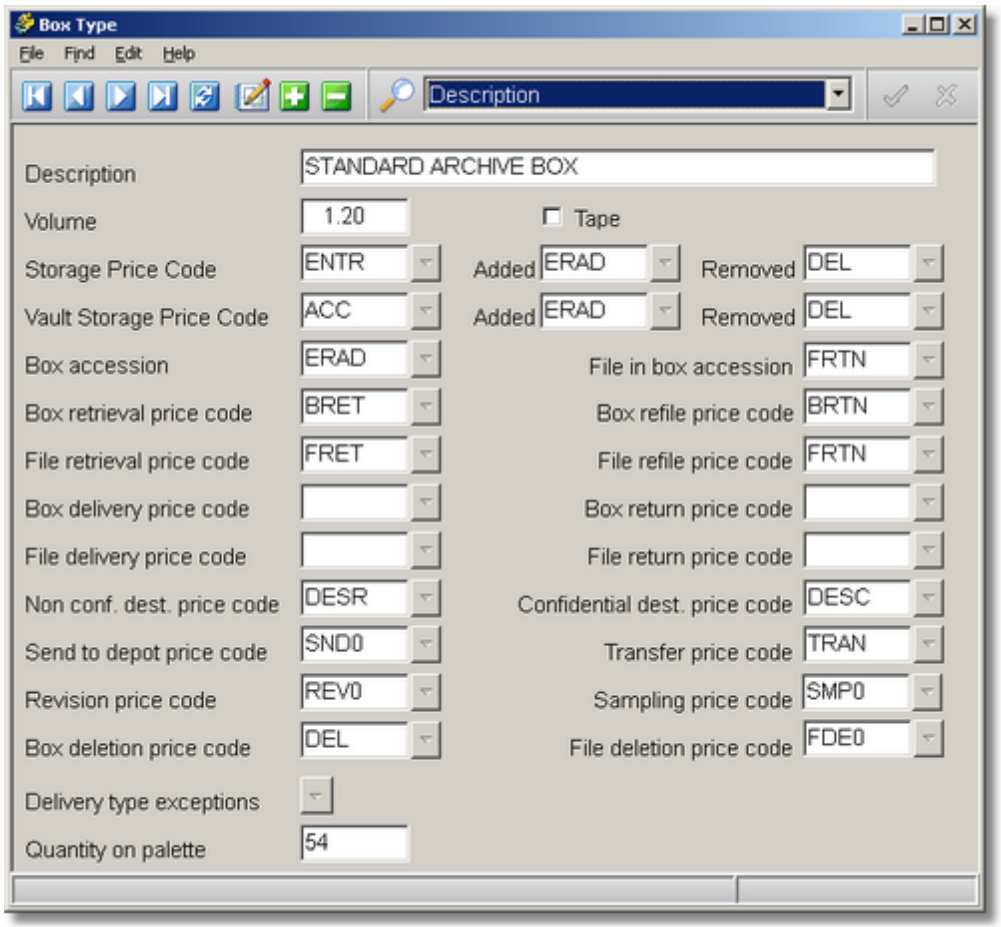
Module window:



9.7.5.2 Fields (Box Type)

Description

Alphanumeric field that can contain a maximum of 40 characters.
This field accepts a description of the box type. This description will appear every time the list of the box types is displayed, and it can also appear on location labels assigned to this box type.

Volume

Unique numeric value from "0.01" to "9999.00".

For customers who use box types (which is typically recommended), the "volume" of a box associates it with the
correct box type.

Customers who do not use box types are billed for storage by volume. The final digit of the volume is not considered significant in storage calculations; both will be billed as 0.8 cubic feet of storage. However, a box assigned a volume of 0.81 cannot go into a location of size 0.82. This is useful when boxes of similar volumes have different shapes.

Tape

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Checking this box identifies a box type as a tape. This affects the type of labels that are printed, various descriptions, and other tape-specific parameters.

Storage Price Code

Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for regular storage fees for any item associated to that box type.

• Added

- Drop-down field associated to a list defined in the General Pricing module. The description from this price code is used for adjustments for regular storage of newly-added boxes or tapes. Note that the actual charge is calculated by prorating the Storage Price Code.

• Removed

- Drop-down field associated to a list defined in the General Pricing module. The description from this price code is used for adjustments to regular storage for newly-removed boxes or tapes. Note that the actual credit is calculated by prorating the Storage Price Code.

Vault Storage Price Code

Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for vault storage fees for any item associated to that box type.

• Added

- Drop-down field associated to a list defined in the General Pricing module. The description from this price code is used for adjustments for vault storage of newly-added boxes or tapes. Note that the actual charge is calculated by prorating the Vault Storage Price Code.

• Removed

- Drop-down field associated to a list defined in the General Pricing module. The description from this price code is used for adjustments to vault storage for newly-removed boxes or tapes. Note that the actual credit is calculated by prorating the Vault Storage Price Code.

Accession

Drop-down field associated to a list defined in the General Pricing module.
This field accepts a price code for accession fees for items associated to that box type.

This charge is automatically applied the first time that a given box of this type goes to the IN state, on a delivery. It is not applied when boxes are created or imported directly in the IN state.

File in box accession

Drop-down field associated to a list defined in the General Pricing module.
This price code will be used in billing for filing new files into existing boxes of this type, through the return delivery module. It replaces the File refile price code.

This also offers a mechanism for billing for inter-filing.

Box retrieval price code

Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the picking of boxes associated to that box type. This field can be overridden for specified delivery types 731.

Box refile price code

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Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the refilling of boxes associated to that box type.

File retrieval price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the picking of files in boxes associated to that box type. This field can be overridden for specified delivery types[731].

File refile price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the refilling of files in boxes associated to that box type.

Box delivery price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the delivery of boxes. It is only used when the customer's Courier billing[253] option is By item type or Item type round trip.

Box return price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the return of boxes. It is only used when the customer's Courier billing[253] option is By item type.

File delivery price code
Drop-down field associated to a list defined in the General Pricing module.
This field allows to select a price code for the delivery of files. It is only used when the customer's Courier billing[253] option is By item type or Item type round trip.

File return price code
Price code applied for the return of files when the customer's Courier billing[253] option is By item type.

Non conf. dest. price code
Price code applied for destruction of this type of box, with the disposal type Non confidential. This is typically used for destruction that is not done under record center supervision

Confidential dest. price code
Price code applied for destruction of this type of box, with the disposal type Confidential. Used for destruction done under supervision by the record center

Send to depot price code
Price code applied for the disposal of this type of box, with the disposal type Send to depot[868]. This is typically used when formerly active files are sent to the record center for semi-active storage.

Transfer price code
Price code applied for the transfer of this type of box, through the processing of a transfer list[552]. This is for moving pallets of boxes to an external storage facility.

Revision price code
Price code applied for destruction of this type of box, with the disposal type Revision[868]. Revisions involves sending pallets of boxes to the customer, who will decide what to do with them.

Sampling price code

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Price code applied for destruction of this type of box, with the disposal type Sampling. Sampling involves keeping samples of the material and destroying the remainder.

Box deletion price code

Price code applied for permanent removal of boxes of this type, either through specifying a box as permanently out during order entry, or by processing a deletion list.

File deletion price code

Price code applied for the deletion of files from this type of box. This is not widely used.

Delivery type exceptions

Drop-down field associated to a list defined in the Delivery Type module.
The default File retrieval price code and Box delivery price codes can be overridden for any number of specified delivery types. (For example, you may wish to charge more for urgent client pick-ups.)
See Defining delivery type exceptions 731 for additional details.

Quantity on Pallet
Field associated with the number of boxes that can fit on a palette.

9.7.5.3 Adding or editing a box type

Before creating a box type it is essential to establish, in the General Pricing 734 module, the price codes that will be attached to the box types. Furthermore, if a customer wants to associate a box type to its items, a function must be activated in the Customer Information module (see the Fields 248 section of that module for more details).

1. Click on **Accounting->Box Type** from the Main window.
2. Click on **Edit->Add|Edit**.
3. Enter or modify the wanted information in the appropriate field (see the previous section 728 for more details on their content).
4. Click on the **Accept** button to register the addition or the modifications.

9.7.5.4 Defining delivery type exceptions

When a box type is defined, exceptions may be applied for the retrieval rates used for specific delivery types. For example, it is possible to choose a higher price for the picking of boxes for rush deliveries. The following topic explains how to set up these retrieval rates.

Adding retrieval rates

Before associating delivery type exceptions with rates, retrieval rates should be added to the price code list for both boxes and files.

Here are examples of price codes that could be added :
- RUFR : Rush delivery file retrieval
- RUBR : Rush delivery box retrieval
- URFR : Urgent delivery file retrieval
- URBR : Urgent delivery box retrieval
- 1HFR : 1 hour delivery file retrieval
- 1HBR : 1 hour delivery box retrieval

Here are suggested settings :

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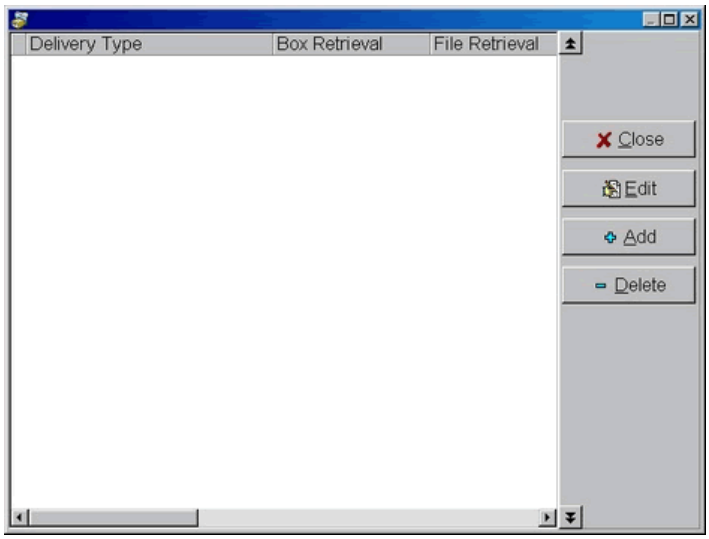
Units - Units
Line Item - No
Customer specific - Unchecked
Order Entry - Unchecked
Courier - Unchecked
Group - Labour

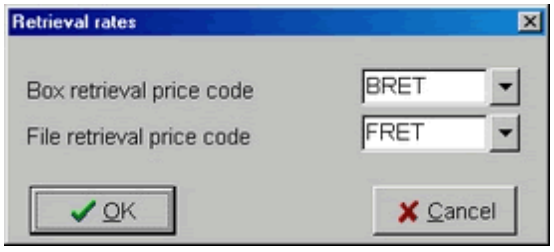
Consult the Fields (General Pricing)[735] and Adding or editing a price[739] topics for more information on general price codes.

Adding, editing and deleting delivery type exceptions

1. Click on **Accounting->Box Type** from the Main window.
2. Click on **Edit->Edit**.
3. Click on the drop-down button beside the Delivery Type exceptions field. A window appears.



- To add an exception, press on the **Add** button. The list of Delivery Types available appears. Select one (it will be highlighted) and press **OK**. A window appears.



Select a price code from the list for boxes and files by pressing on the drop-down button beside the field, and press **OK**.

The changes made will be registered in the system and will overrule the ones in the Delivery Type[725] module. Take note that the changes will NOT appear in the Delivery Type module.

- To edit a delivery type exception, select a delivery type in the list (it will appear highlighted) and press on the **Edit** button. The same steps can be followed as when adding an exception (see above).

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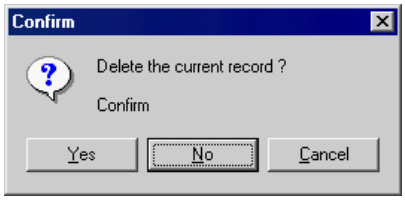
- To delete an exception, select a delivery type in the list (it will appear highlighted) and press on the **Delete** button. The changes will be registered in the system, but will NOT appear in the Delivery Type module.

4. When all the changes have been performed, press on the **Close** button. Press **OK**.

9.7.5.5 Deleting a box type

Before deleting a box type, it is essential to check that no inventory item is associated to the box type in question.

1 Click on **Accounting**->**Box Type** from the Main window.
2 Search the desired box type, keep it on the screen and click on **Edit**->**Delete**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion.

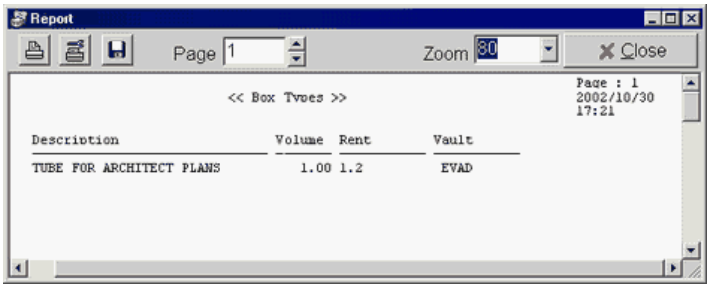
9.7.5.6 Copying and adding a box type

This function is used when the box type that needs to be created highly resembles an existing box type. The box type newly created can be modified in order to have its own billing settings.

1 Click on **Accounting->Box Type** from the Main window.
2 Click on **Edit->Copy and Add**
3 Enter or modify the wanted information in the appropriate field (see the previous section 728 for more details on their content).
4 Click on the **Accept** button to register the modifications.

9.7.5.7 Viewing or printing the list of all box types

1 Click on **Accounting**->**Box Type** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. The list of all the box types is automatically displayed in a report window or printed on the default printer.



3 Click on the **Close** button to end the viewing.

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9.7.6 General Pricing

9.7.6.1 Overview (General Pricing)

The general pricing module permits you to define and manage the price codes that are applied to billable services, storage, and line-items. For a discussion of price codes, see Assigning price codes to services and products 739.

Once defined in the Accounting->General Pricing module, price codes can be overridden for individual customers in the Customer->Customer Pricing module.

Available reports

- list of general prices, including code and description

Fields 735 (see the next section)

Tasks

- Adding or editing a price 739
- Creating a line item 739
- Viewing or printing the list of all general prices 740

Distinctive menu options: (None)

Module window:

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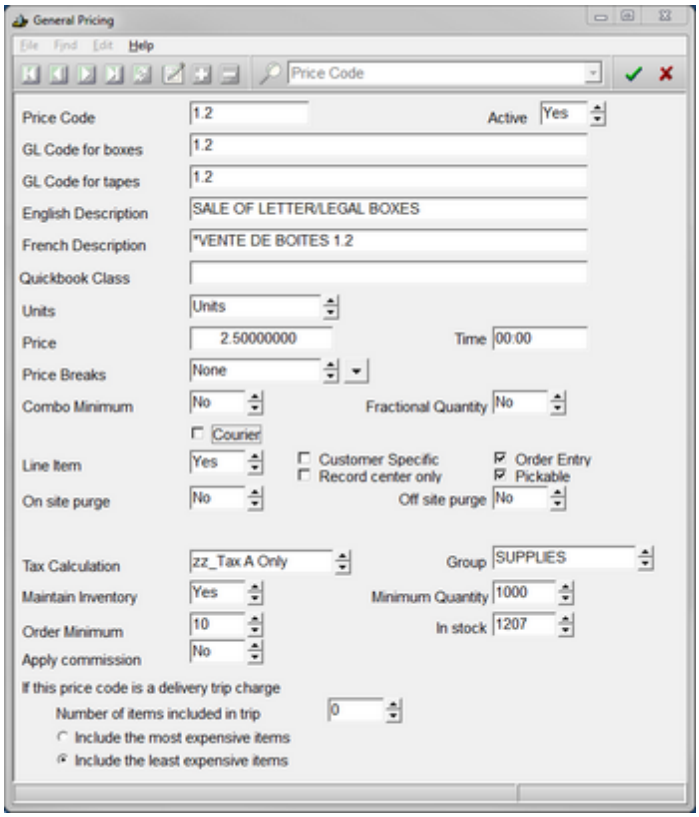

9.7.6.2 Fields (General Pricing)

Price Code

Unmodifiable alphanumeric field containing 4 characters that uniquely identify a price code in the system. Use a consistent logic when naming price codes, so that they can be more easily recalled. For example delivery of a size-1.0 box might be BD10.

GL Code for boxes

Alphanumeric field of up to 30 characters. This is used when exporting invoicing data from EDC to another accounting system and must be created in the accounting system (QuickBooks, MYOB) before being entered in the current field.
This is a General Ledger code that will allow the new accounting system to identify EDC items as boxes and to update its billing consequently (picking boxes, refilling boxes, storing boxes, etc).

GL Code for tapes

Alphanumeric field of up to 30 characters.
This field has exactly the same function than the previous field, Gb Code for boxes, but applies to items which are magnetic tapes.

English Description

Alphanumeric field of up to 40 characters, used on English invoices as well as in the software and in ActiveWeb in that language. It can be overridden in customer pricing.

French Description

Alphanumeric field of up to 40 characters, used on French invoices as well as in the software and in ActiveWeb in that language. It can be overridden in customer pricing.

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QuickBooks Class

If you are using QuickBooks (TM) for tracking your accounts receivable and have different types of price codes divided into different classes, this field can help you to ensure that your invoice data imports correctly.

Units

Choice field that can contain values "Units", "Minutes", "Cubic Feet", "Megabytes", "Linear Feet" or "Delivery". This appears on the invoice with the quantity.

If this is set to **minutes**, the code's price is ignored and the amount will be calculated as the value of the Time field for this price code, multiplied by the value of the Hourly Rate field defined in the Customer Information[248] module. For example, if the Time field is set to 00:15 (15 minutes) and the hourly rate for the customer is $40, $10 will be charged each time the price code is applied.

Price

Numeric value indicating the cost of one unit of the price code. Note that this does not apply if the Units fields is set to minutes or Price Breaks is not set to None.
The "unit price" expression is used here. This is because the prices are defined in unit terms, but also in minute, cubic feet, linear feet or megabyte terms.

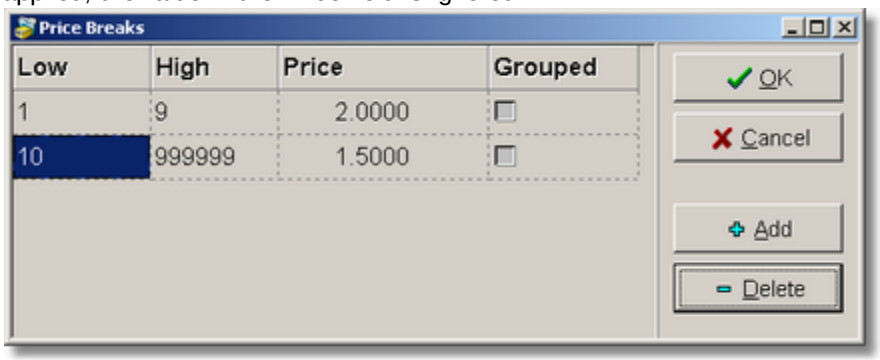
Time

When the Units field is set to Minutes, this specifies how much time (HH:MM) to charge at the customer's hourly rate for each unit of price code.

Price Breaks

Choice field that can contain values "Standard", "None" or "Tiered".

The price breaks allows the cost per unit to vary with the number of units ordered. If price breaks are applied, the value in the Price field is ignored.



- Standard : all units are charged at the same rate, but this rate will depend on the number of units delivered. With the above example, 20 units would cost 20x$1.50 = $30.
- Tiered : multiple tiers of pricing exist in the same calculation. In this case, 20 items would cost $2 each for the first 9 items and $1.50 each for the next 11, for a total of $34.50
- None: Any price breaks are ignored. All items are charged at the rate specified in the "Price" field above.

Note : For "Standard" and "Tiered", it is necessary to click on the drop-down button of the field, in order to specify price breaks for which parameters are the following :

- Low and High : range or boundaries of a price break.

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- Time (present when the Units field is set to "Minutes") : time charged for the items included in the price break, according to the hourly rate of the customer.
- Price (present every time except when the Units field is set to "Minutes") : amount charged for each item included in the price break.

- Grouped : If selected, the same cost is applied for part or all of the group defined by the range. (e.g., with $10 for delivery of 1-5 items, $10 will be charged whether 1 or 5 items are delivered.) With standard price breaks and grouping, only the applicable tier is charged. With tiered price breaks and grouping, the current tier is charged, along with all those below it.

Combo minimum

Use of this option is not generally recommended for record centers new to EDC, as clearer methods for achieving similar results now exist. It affects how tiered price breaks are applied on box and file delivery handling.

Example :
3 boxes and 2 files are ordered. Price breaks for the file delivery code are $2.50 for the first, $1.75 for the rest.

If this field is set to No, the cost is $2.50 + $1.75, corresponding to files 1 and 2.
If this field is set to Yes, the cost is $1.75 + $1.75 for items 4 and 5.

Boxes are counted before files.

Fractional Quantity

When this field is set to No, only whole quantities can be entered. For example, it is possible to order 1 item but not 0.5 items.

Courier

When assigning price codes to box types and delivery types, this check box must be selected for the price code to show up in the list of available delivery or return price codes for item delivery handling.

Line Item

When this field is set to Yes, the price code will appear on the list of choices that can be added to a delivery (Delivery Billing 712 module). Depending on the following options, they may be available at order entry and they may be made customer specific, and not available for order by ActiveWeb.

• Customer specific

Applies to line items. When this box is checked, it indicates that the line item will only appear for this specific customer (the customer can then be chosen by clicking on the drop down button. To add a customer to the list, press on the Add button; select the customer from the list and press OK. To delete a customer from the list, select a customer - it will appear highlighted - and press on the Delete button.)

• Order Entry

Applies to line items. When this box is checked, the item can be added to an order (Order 588 module).

• Record Center Only

Applies to line items. These items can not be seen by customers for ordering via ActiveWeb. examples might include credits.

• Pickable

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When a line item is placed on an order, if it is flagged as "pickable" it will be included in the picking list on the PDT. If an order includes only items that are not pickable, the order will be closed immediately and the associated delivery will go straight to the verified state - bypassing the circulation process. No delivery charges are applied.

On site purge | Off site purge

*** On site purge items and Off site purge items can only be included on orders for the appropriate delivery type. Since purge services are generally only estimates of the amount of work required, your drivers can use rcMobile to adjust quantities on site, for approval by the client.

Tax Calculation

Choice field that can contain values ""Not Taxable", "Tax A Only", "Tax B Only", "Tax A plus Tax B" or "Tax B on Tax A".
It allows to determine how the applicable taxes will be calculated (these taxes are defined in the Building 354 module).

Group

Choice field that can contain values "Supplies", "Storage", "Labor", "Courier", "Inventory List", "Imaging", "Open shelf", "Shredding/recyc", or "Miscellaneous".

This determines which header the charges will be grouped under on the invoice.

Maintain Inventory

When this field is set to Yes the system updates the quantity of items in stock with each delivery.

Minimum Quantity

Numeric choice field that can contain values "0" to "9999999" inclusively.
When inventory levels drop to this level, a message will appear prompting users to replenish the stock.

Order Minimum

Numeric choice field that can contain values "0" to "65535" inclusively.
Fewer items less this cannot be ordered by customers.

In stock

Numeric choice field that can contain values "0" to "9999999" inclusively.
It indicates the quantity of items actually available in stock. As soon as an item is ordered, this quantity is updated. When the stocks are renewed, it is possible to enter the bought quantity.

Apply Commission

When this field is set to Yes, revenue due to this price code is included in the calculation of commissions on the commissions report for the salesperson listed in the Customer Information module.

If this price code is a delivery trip charge

Number of items included in trip

Numeric choice field that can contain values "0" to "999999" inclusively.
This is the number of items included in the trip charge (at no additional cost) when the courier billing option in the Customer Information module is not set to "Delivery". These items may be of different types.

Include the (most | least) expensive items

Choice field. If different item types with different delivery costs are delivered, this will determine which

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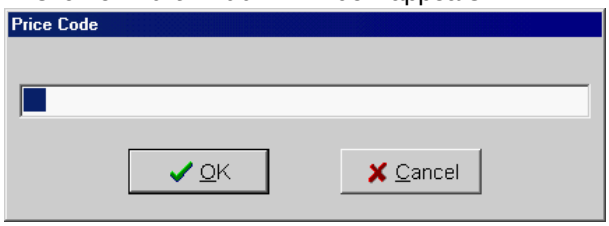
ones to include in the cost first.

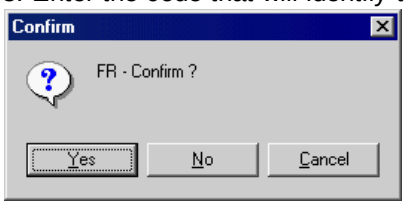
9.7.6.3 Adding or editing a price

Adding a price

1. Click on **Accounting**->**General Pricing** from the Main window.
2. Click on **Edit**->**Add**. A window appears.



3. Enter the code that will identify the new price and press **OK**. A dialog box is displayed.



4. Click on the **Yes** button to confirm the addition.
5. Enter the desired information in the appropriate fields (see the previous section[735] for more details) and click on the **Accept** button.

Editing a price

1. Click on **Accounting**->**General Pricing** from the Main window.
2. Perform a search to display the desired price code on the screen and click on **Edit**->**Edit**.
3. Modify the desired information in the appropriate fields (see the previous section[735] for more details) and click on the **Accept** button.

9.7.6.4 Creating a line item

Price codes may be configured so that they can be added directly to invoices and deliveries. They can also be made available to specific customers or to all customers at order entry.

In the **Accounting->General Pricing** module, add a new price code[739], or edit an existing one as follows:

1. Specify the description of the price code, as it should appear at order entry and on the invoice.
2. Ensure that the Line item[737] field is set to Yes.
3. If it should be accessible from the Orders->Order module, check the Order entry box.
4. If it should not be available for order by the customer on line, check the Record center only box.
5. If it is available to some but not all customers, check the Customer specific box, and select the appropriate customers.
6. If inventory is maintained, set Maintain inventory to Yes, and specify the Order minimum, the Minimum quantity before warning to re-order, and the current quantity In stock.

9.7.6.5 Assiging price codes to services and products

There are three sources of charges on invoices:

1. Storage costs are calculated based on the inventory.
2. Charges may be added directly to the invoice, either manually[701] or as periodic invoice items[749].
3. All other charges are collected from the deliveries[712] dated during the invoice period.

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Inventory charges

If customers do not use box types, then their storage charges are based on their volume of boxes stored in regular storage and in vault storage. These charges and descriptions are set up through required price codes[741].

Most customers are set up for billing using box types. In this case, price codes for storage and services can be assigned for each box type in the box type module[727].

A minimum invoice adjustment can be applied at the customer[251] or departmental invoice[755] level. These adjustments are typically applied to the storage costs alone, but can be applied to the entire invoice including service if desired.

Image and electronic document storage is billed by megabyte per year using a required price code[741] (ISTR). Open shelf file storage (ETOR) is billed based on the total length of shelf locations for open file storage[524] allocated to a customer.

It is also possible to assign price codes to locations[515] that are reserved for a specific customer. This will be applied on each storage invoice, whether or not the space is occupied.

Invoice charges

Examples of charges added directly to the invoice might include web license, other periodic flat-rate charges, and one-time credits.

Charges for delivery of goods or services

All other charges are collected on deliveries for billing. For example, if you re-box a damaged box for a customer and they are to be billed for this service, EDC will automatically create a delivery to apply these charges to. Similarly, if you perform work such as inventorying boxes for a customer, you would create a delivery to bill for this time.

Price codes for various **box and file handling operations** are specified in the box type module[728], and in the required price codes[741] for customers not set up to use box types. Charges associated with the delivery are mapped in the delivery type module[722]. Where item delivery handling charges are taken from (box type, delivery type, default price codes, or none) depends on the courier billing[253] setting for the customer

Price codes for **shredding operations** are assigned in the shredding container module[580].

Items that do not have EDC bar codes on them are ordered and delivered as **line items**, set up directly in the general pricing[734] module and overridden in customer pricing[743] as necessary.

9.7.6.6 Viewing or printing the list of all general prices

1. Click on **Accounting**->**General Pricing** from the Main window.
2. Click on **File**->**View Report**|**Print Report**. The report is displayed or printed soon after.

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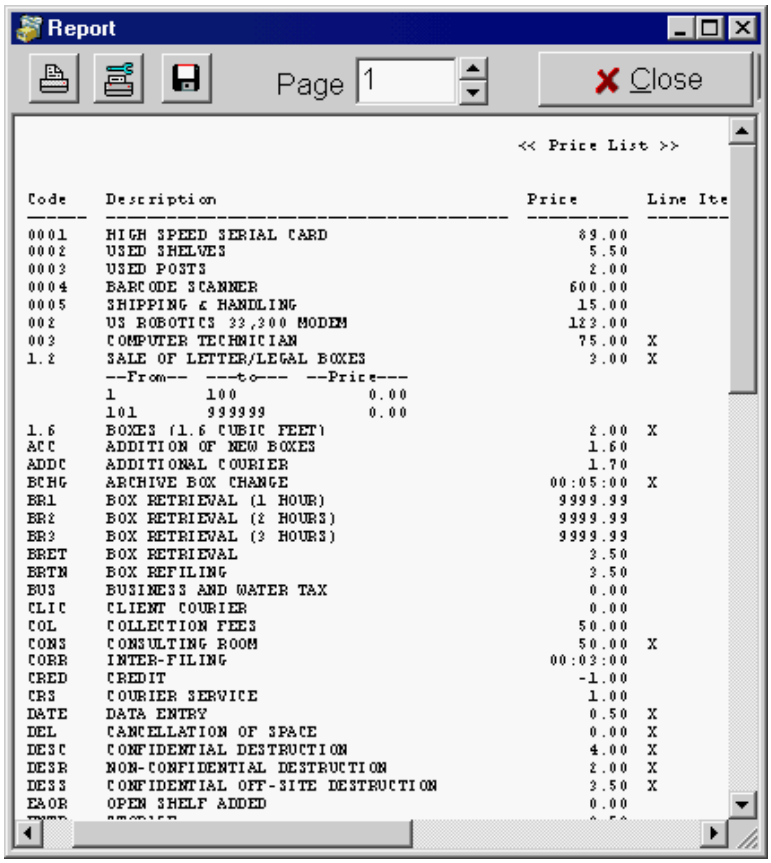
Report
Page 1
Close
<< Price List >>
Code Description Price Line Ite
0001 HIGH SPEED SERIAL CARD 89.00
0002 USED SHELVES 5.50
0003 USED POSTS 2.00
0004 BARCODE SCANNER 600.00
0005 SHIPPING & HANDLING 15.00
002 US ROBOTICS 33,300 MODEM 123.00
003 COMPUTER TECHNICIAN 75.00 X
1.2 SALE OF LETTER/LEGAL BOXES 3.00 X
--From-- ---to--- --Price---
1 100 0.00
101 999999 0.00
1.6 BOXES (1.6 CUBIC FEET) 2.00 X
ACC ADDITION OF NEW BOXES 1.60
ADDC ADDITIONAL COURIER 1.70
BCHG ARCHIVE BOX CHANGE 00:05:00 X
BR1 BOX RETRIEVAL (1 HOUR) 9999.99
BR2 BOX RETRIEVAL (2 HOURS) 9999.99
BR3 BOX RETRIEVAL (3 HOURS) 9999.99
BRET BOX RETRIEVAL 3.50
BRTN BOX REFILING 3.50
BUS BUSINESS AND WATER TAX 0.00
CLIC CLIENT COURIER 0.00
COL COLLECTION FEES 50.00
CONS CONSULTING ROOM 50.00 X
CORR INTER-FILING 00:03:00
CRED CREDIT -1.00
CRS COURIER SERVICE 1.00
DATE DATA ENTRY 0.50 X
DEL CANCELLATION OF SPACE 0.00 X
DESC CONFIDENTIAL DESTRUCTION 4.00 X
DESR NON-CONFIDENTIAL DESTRUCTION 2.00 X
DESS CONFIDENTIAL OFF-SITE DESTRUCTION 3.50 X
EAOR OPEN SHELF ADDED 0.00

3 Click on the **Close** button to end the viewing.

9.7.6.7 Required price codes

Here are the price codes that are required by **EDC** for proper billing. These price codes should not be erased under any circumstances.

Note: The default price codes should not be erased, yet one should create price codes that fit the record center's needs.

Code	Description	Comment
1.2	Box Sale Price Code	this price code will always apply when selling a box
ACC	New Box Price Code	
BCHG	Box Change Price Code	Box was replaced with a new box (cardboard)
BRET	Box Retrieval Price Code	
BRTN	Box Refile Price Code	
CORR	Inter File Price Code	Inserting a document within a file
DEL	Deletion Price Code	Permanent removal (out fee)
DESC	Confidential Destruction Price Code	

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DESR	Non-Confidential Destruction Price Code	
EAOR	Open Shelf Addition Price Code	Addition of an open shelf file (default price code)
ENTR	Storage Price Code	Regular storage (used when billing by volume)
ENTV	Vault Storage Price Code	Storage in vault (used when billing by volume)
ERAD	Reg Addition Price Code	Additions and deletions during an invoice period. The cost for these items is taken from StoragePrice Code and VaultStoragePrice Code
ERSU	Reg Deletion Price Code	Additions and deletions during an invoice period. The cost for these items is taken from StoragePrice Code and Vault Storage Price Code (default price code)
ETOR	Open Shelf Storage Price Code	Open shelf storage
EVAD	Vault Addition Price Code	Additions and deletions during an invoice period. The cost for these items is taken from StoragePrice Code and VaultStoragePrice Code
EVSU	Vault Deletion Price Code	Additions and deletions during an invoice period. The cost for these items is taken from StoragePrice Code and VaultStoragePrice Code
FRET	File Retrieval Price Code	
FRTN	File Refile Price Code	
IDNL	Image Download From RC Price Code	
ISTR	Electronic Document Storage Price Code	Annual rate per MB, includes both images and EDM documents.
IUPL	Image Upload To RC Price Code	
MAIN	Labour Price Code	Mandatory labor price code. It must be defined as a 1 minute quantity in the general pricing module.
MINV	Minimum Invoice Cost Adjustment	
OIAC	Open Shelf ACC Price Code	Non-inventoried open shelf accession
OIFN	Open Shelf Refile Price Code	Inventoried open shelf file return and accession
OIFR	Open Shelf Retrieval Price Code	Inventoried open shelf file retrieval
OSDL	Open Shelf Delivery Price Code	Only used when courier billing is by item type
OSRT	Open Shelf Return Price Code	Only used when courier billing is by item type
RET	Return Courier Price Code	ReturnCourierPrice Code

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SRCH	Search Price Code	For non track file and box searches
SURC	Surcharge Price Code	Miscellaneous additional charge
FTKO	File Tracking Charge Price Code	Tracking files within boxes (charges per units within box)
FBA0	File Accession Price Code	Replaces the refiling fee for addition of files to existing boxes
TRAN	TransferPCode	
BDL0	BOX DELIVERY	
BRT0	BOX RETURN	
FDE0	FILE CANCELLATION (PERMOUT)	
FDL0	FILE DELIVERY	
FRT0	FILE RETURN	
REV0	REVISION	
SMP0	SAMPLING	
SND0	SEND TO DEPOT	
EXTC	EXTERNAL COURIER	
REGC	REGULAR COURIER	

9.7.7 Customer Pricing

9.7.7.1 Overview (Customer Pricing)

When creating invoices, EDC consults this module in determining how to apply a price code. If the given price code is not defined for the customer in this module, it will apply the pricing from the **Accounting->General Pricing** module.

Available reports

- list of customer prices, including code and description

Fields[744] (see the next section)

Tasks

- Adding, editing or deleting a price for one customer[746]
- Copying prices for one customer[747]
- Viewing or printing the prices one customer[749]

Distinctive menu options:

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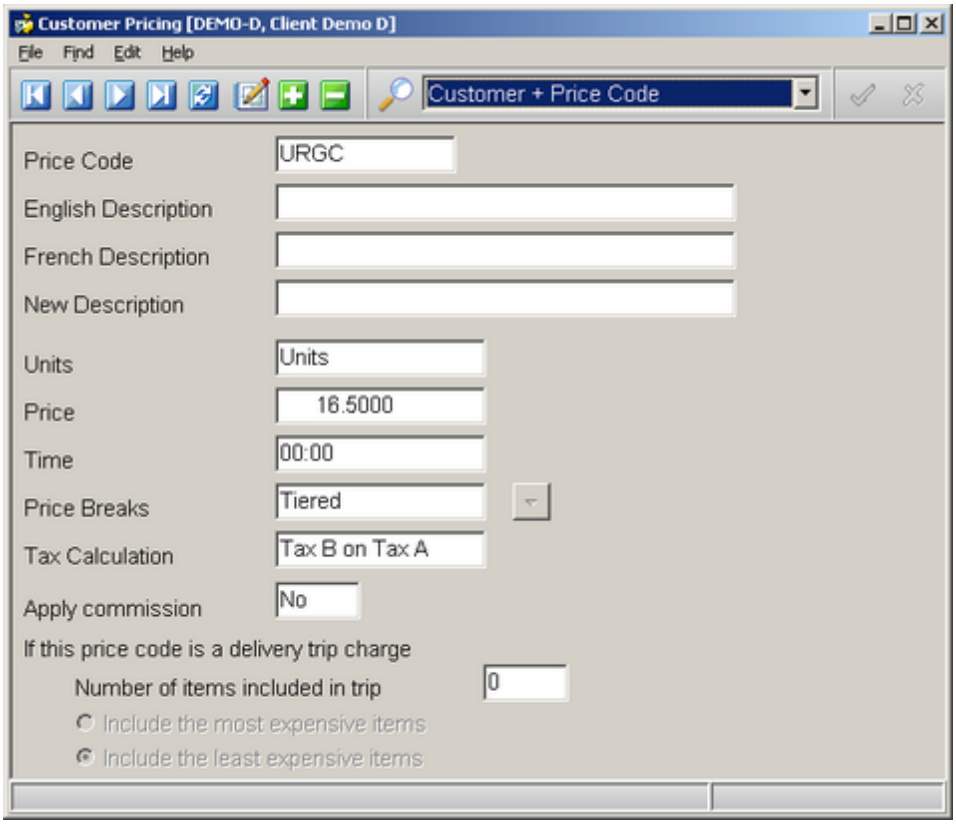
File menu
- Copy price codes[747]
- Global rate change[747]

Module window:



9.7.7.2 Fields (Customer Pricing)

Price Code
Unmodifiable alphanumeric field containing 4 characters that uniquely identify a price code in the system. Use a consistent logic when naming price codes, so that they can be more easily recalled. For example delivery of a size-1.0 box might be BD10.

English Description
Alphanumeric field of up to 40 characters, used on English invoices as well as in the software and in ActiveWeb in that language. It can be overridden in customer pricing.

French Description
Alphanumeric field of up to 40 characters, used on French invoices as well as in the software and in ActiveWeb in that language. It can be overridden in customer pricing.

New Description
Alphanumeric field of up to 40 characters, used to override the description (in the customer's default language) on the invoice

Units

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Choice field that can contain values "Units", "Minutes", "Cubic Feet", "Megabytes", "Linear Feet" or "Delivery". This appears on the invoice with the quantity.

If this is set to **minutes**, the code's price is ignored and the amount will be calculated as the value of the Time field for this price code, multiplied by the value of the Hourly Rate field defined in the Customer Information[248] module. For example, if the Time field is set to 00:15 (15 minutes) and the hourly rate for the customer is $40, $10 will be charged each time the price code is applied.

Price

Numeric value indicating the cost of one unit of the price code. Note that this only applies if Price Breaks is set to None, and the Units is not set to minutes.

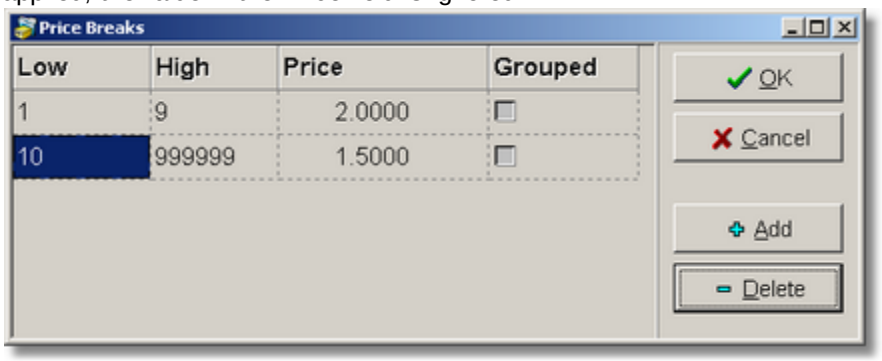
Time

When the Units field is set to Minutes, this specifies how much time (HH:MM) to charge at the customer's hourly rate for each unit of price code.

Price Breaks

Choice field that can contain values "Standard", "None" or "Tiered".

The price breaks allows the cost per unit to vary with the number of units ordered. If price breaks are applied, the value in the Price field is ignored.



- Standard : all units are charged at the same rate, but this rate will depend on the number of units delivered. With the above example, 20 units would cost 20x$1.50 = $30.
- Tiered : multiple tiers of pricing exist in the same calculation. In this case, 20 items would cost $2 each for the first 9 items and $1.50 each for the next 11, for a total of $34.50
- None: all items char

Note : For "Standard" and "Tiered", it is necessary to click on the drop-down button of the field, in order to specify price breaks for which parameters are the following :

- Low and High : range or boundaries of a price break.
- Time (present when the Units field is set to "Minutes") : time charged for the items included in the price break, according to the hourly rate of the customer.
- Price (present every time except when the Units field is set to "Minutes") : amount charged for each item included in the price break.

- Grouped : If selected, the same cost is applied for part or all of the group defined by the range. (e.g., with $10 for delivery of 1-5 items, $10 will be charged whether 1 or 5 items are delivered.) With standard price breaks and grouping, only the applicable tier is charged. With tiered price breaks and grouping, the current tier is charged, along with all those below it.

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Apply Commission
When this field is set to Yes, revenue due to this price code is included in the calculation of commissions on the commissions report for the salesperson listed in the Customer Information module.

If this price code is a delivery trip charge

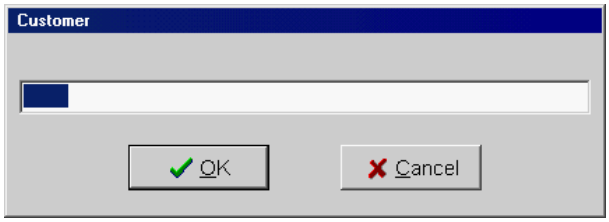
Number of items included in trip
Numeric choice field that can contain values "0" to "999999" inclusively.
This is the number of items included in the trip charge (at no additional cost) when the courier billing option in the Customer Information module is not set to "Delivery". These items may be of different types.

Include the (most | least) expensive items
Choice field. If different item types with different delivery costs are delivered, this will determine which ones to include in the cost first.

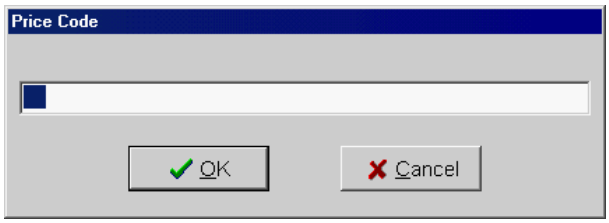
9.7.7.3 Adding, editing or deleting a price for one customer

1 Click on **Accounting**->**Customer Pricing** from the Main window.
2 Perform one of the following operations :

- To add a price, click on **Edit**->**Add**. A window appears.



Enter the code of the desired customer and press **OK**. A new window appears.



Enter a code to indicate where to start in the selection list and press **OK**. A window appears, containing a list of all the codes defined in the General Pricing[734] module. Select a code that will identify the price everywhere in the system and press **OK**. Enter the desired information in the appropriate fields and click on the **Accept** button.

- To modify a price, find the desired price code and keep it on the screen. Click on **Edit**->**Edit**. Enter the desired information in the appropriate fields and click on the **Accept** button.

- To delete a price, find the desired price code and keep it on the screen. Click on **Edit**->**Delete**. Confirm the operation by clicking on the **Yes** button of the dialog box that appears.

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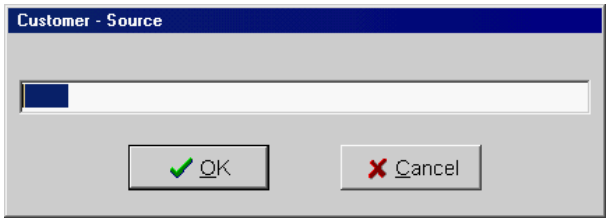
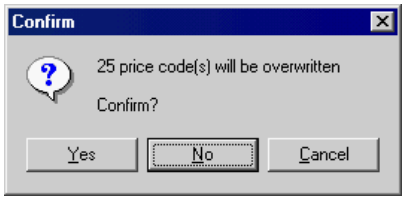
9.7.7.4 Copying prices for one customer

This operation allows to copy all the prices for a customer in order to grant the same prices to another customer. It can be useful when a customer signs a contract with the record center and has the same terms as another customer.

1 Click on **Accounting**->**Customer Pricing** from the Main window.
2 Click on **File**->**Copy Price Codes**. A window appears.



3 Enter the code of the customer for whom the prices will be copied and press **OK**. A new window appears and allows to select the target customer.
4 Enter the code of the desired customer and press **OK**. A dialog box is displayed.



Note : This dialog box indicates the number of price codes already defined for both customers (source and target) and which are similar.

5 Click on the **Yes** button to confirm the operation. The price codes of the target customer are updated.

9.7.7.5 Performing a global customer rate change

1 Click on **Accounting**->**Customer Pricing** from the Main window.
2 Click on **File**->**Global Rate Change**. A window appears.

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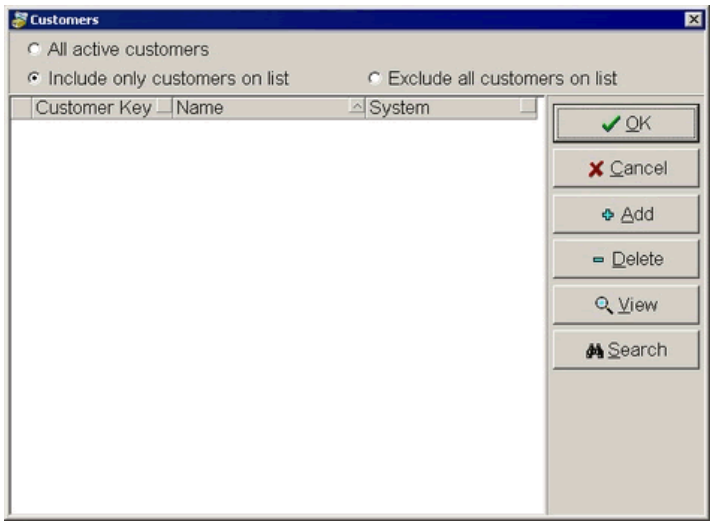
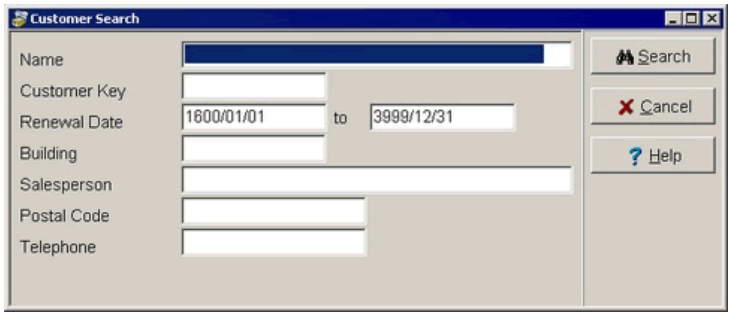


3 Select an option (All active customers | Include only customers on list | Exclude all customers on list).

4 To edit the list of customers:

- To add customers on the list, press the **Add** button. Enter the customer key or press **OK** to have the list of customers (select a customer, it will appear highlighted, and press **OK**). Press **OK**.
- The customer will be added to the list.
- To delete a customer from the list, select the desired customer (it will appear highlighted) and press the **Delete** button.
- To search for a customer, press the **Search** button. A window appears.



Enter the desired search criteria and press on the **Search** button. All the customers that correspond to the specified criteria are included in the list.

- To view the information of a customer, select the desired customer (it will appear highlighted) and press the **View** button.

5 When the list is complete, press **OK**. A window appears.

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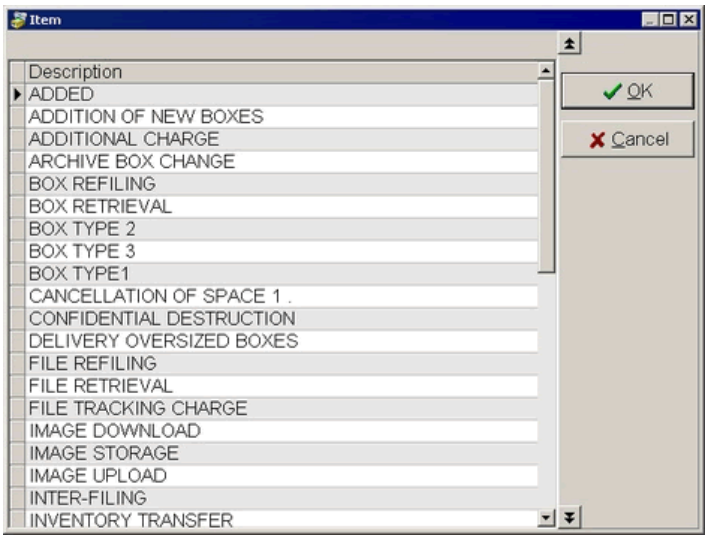
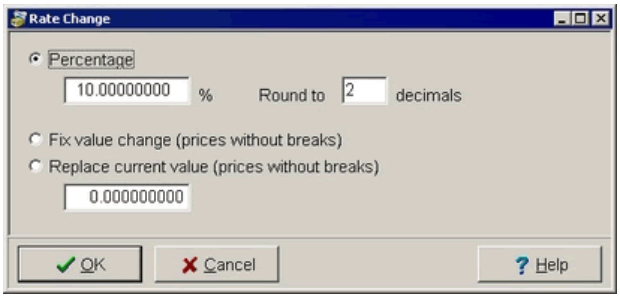


6 Select the desired price codes (they will appear highlighted) and press **OK**. A window appears.



7 Select the desired option and enter the different values (when needed). Press **OK**.
8 A confirmation message appears. Press Yes to continue, No or Cancel to abort the operation.
9 Enter your password and press **OK**.
10 If the changes could not be done, a report appears with the different errors.

9.7.7.6 Viewing or printing the prices one customer

1 Click on **Accounting**->**Customer Pricing** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. A window appears and allows to select a customer.
3 Enter the code of the desired customer and press **OK**. The report is automatically printed or displayed.

9.7.8 Periodic Invoice Item

9.7.8.1 Overview (Periodic Invoice Item)

In automating your invoicing, you may wish to apply periodic charges directly to invoices, such as a web access fee. This module permits you to apply charges daily, weekly, monthly, or annually.

Note: Other methods of applying periodic charges exist:

- You may bill for web licenses by configuring the web access fee settings[255] in the Customer->Customer Information module.

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- Periodic charges may be added to the storage invoice by associating price codes to locations[515] (such locations do not need to physically exist).
- Periodic line item charges may also be added by ordering line items that are not pickable[737] using the Orders->Recurring Orders[681] module. Orders containing only non-pickable line items will automatically be closed, and their deliveries verified, upon order creation.

Available reports

- list of periodic invoice items, either for one or for all customers

Fields[750] (see the next section)

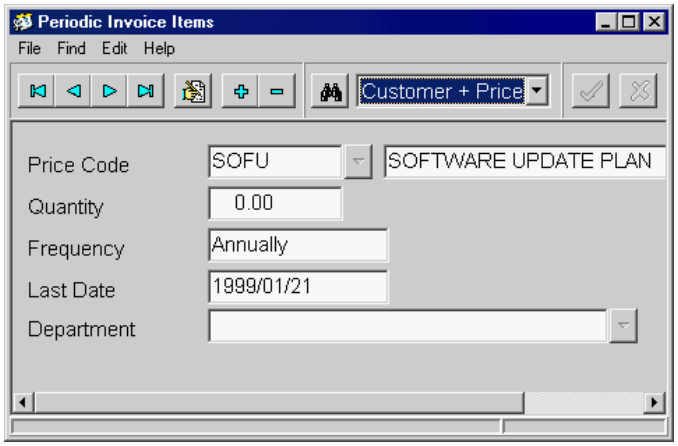
Tasks

- Adding a periodic invoice item[751]
- Editing a periodic invoice item[752]
- Deleting a periodic invoice item[752]
- Viewing or printing the list of periodic invoice items[752]

Distinctive menu options:

- None

Module window:



9.7.8.2 Fields (Periodic Invoice Item)

Price Code
Drop-down field associated to a list defined with the internal parameters of the system.
It allows to select a price code and consequently, to associated some charges to the item (the charges are defined in the Customer Pricing[743] module).

Quantity
Choice field containing values "0.00000000" to " 99999999.99999999" inclusive.
It allows to enter the quantity of items to bill periodically.

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Frequency
Choice field containing the values "Daily", "Weekly", "Monthly" or "Annually".
It allows to select a frequency for which the item will appear on invoices of the concerned customer.

- For "Annually", the item is charged once during the year.
- For "Monthly", the item is charged 12 times during the year. It will appear once on monthly invoices, etc.
- For "Daily", the item is charged as often as there are days in the billing period.

Ex : For monthly invoices such as the invoice of November (31 days), the item is charged 31 times; for the invoice of October (30 days), the items is charged 30 times, etc.

- For "Weekly", the item is charged as often as there are complete weeks (7 entire days) between the Last Date the item was billed (see the next field) and the end date of the billing period.

Ex: Lets consider a billing period from October 1st to October 31st and an item whose last billing date was September 30th (it can then be charged again from October 1st). From October 1st to October 31st, there are 31 days. The periodic item will appear 4 times on the invoice, for 4 x 7 entire days (4 x 7 = 28 that fits in 31).

Lets consider the same item but a billing period from November1st to November 30th. The system does not consider the billing period but retains that the item was last charged on September 30th. It calculate that there are 61 days between October 1st and November 30th. The periodic item will appear 8 times on the invoice, for 8 x 7 entire days (8 x 7 = 56 that fits in 61).

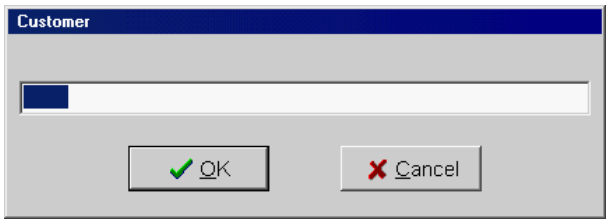
Last Date
Field with a predefined date mask defined in the System Information module.
It indicates when the items has been billed for the last time. According to the settings of the previous field, it is possible to evaluate the next time the item will be billed.

Note : This date can be changed manually if necessary. When an invoice is created in the Invoicing module, this field is automatically updated, in order to notify that the periodic item has been billed. But if, for any reasons, the related invoice is deleted and not replaced, the value of this field will not be changed consequently. It is then necessary to stay vigilant when billing these items.

Department
Drop-down field associated to a list defined in the Departments module.
It allows to select the department to be charged. This field is displayed only for customers who are billed by department (see the description of the Billing[248] field in the Customer Information module).

9.7.8.3 Adding a periodic invoice item

1 Click on **Accounting**->**Periodic Invoice Item** from the Main window.
2 Click on **Edit**->**Add**. A window appears.



3 Enter the code of the desired customer and press **OK**.

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4 Enter the significant information in the appropriate fields (see the previous section[750] for more details) and click on the **Accept** button when finished.

9.7.8.4 Editing a periodic invoice item

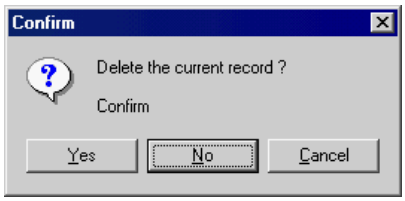
A periodic invoice item can be modified as many times as desired. For example, the record center could have to modify the billing frequency of a periodic invoice item, in order to respect some new contract clauses for a customer.

1 Click on **Accounting**->**Periodic Invoice Items** from the Main window.
2 Find the desired item and keep it on the screen. Click on **Edit**->**Edit**.
3 Perform modifications in the appropriate fields (see "Fields[750]" in the current module for more details). Click on the **Accept** button to save changes.

Note : All the fields can be modified, except for the Description field.

9.7.8.5 Deleting a periodic invoice item

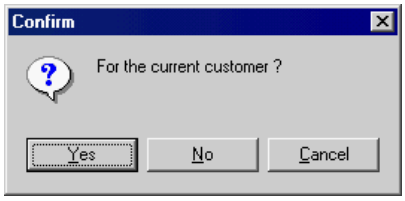
1 Click on **Accounting**->**Periodic Invoice Items** from the Main window.
2 Find the desired item and keep it on the screen. Click on **Edit**->**Delete**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion. The item will not be billed periodically to the customer.

9.7.8.6 Viewing or printing the list of periodic invoice items

1 Click on **Accounting**->**Periodic Invoice Items** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. A dialog box appears.



3 Click on the **Yes** button to include only the current customer on the report or click on the **No** button to produce a general report for all the customers. The chosen report will be printed or displayed automatically.

Note : The report produced here indicates the name of the customers, a description of the periodic items, their quantity and billing frequency.

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9.7.9 Departmental Invoicing

9.7.9.1 Overview (Departmental Invoicing)

Larger organizations may have departments that manage their budgets independently. The present module makes it possible to configure departments or groups of departments to receive invoices separate from the global invoice. (The for this, the invoicing option in the Customer->customer information module should be Departmental.

Available reports

- list of departments billed separately for one customer

Fields[754] (see the next section)

Tasks

- Establishing the parameters of departmental invoicing for a customer[755]
- Editing or canceling parameters of departmental invoicing for a customer[756]
- Viewing or printing the list of departments billed separately for a customer[756]

Distinctive menu options:

- None

Module window:

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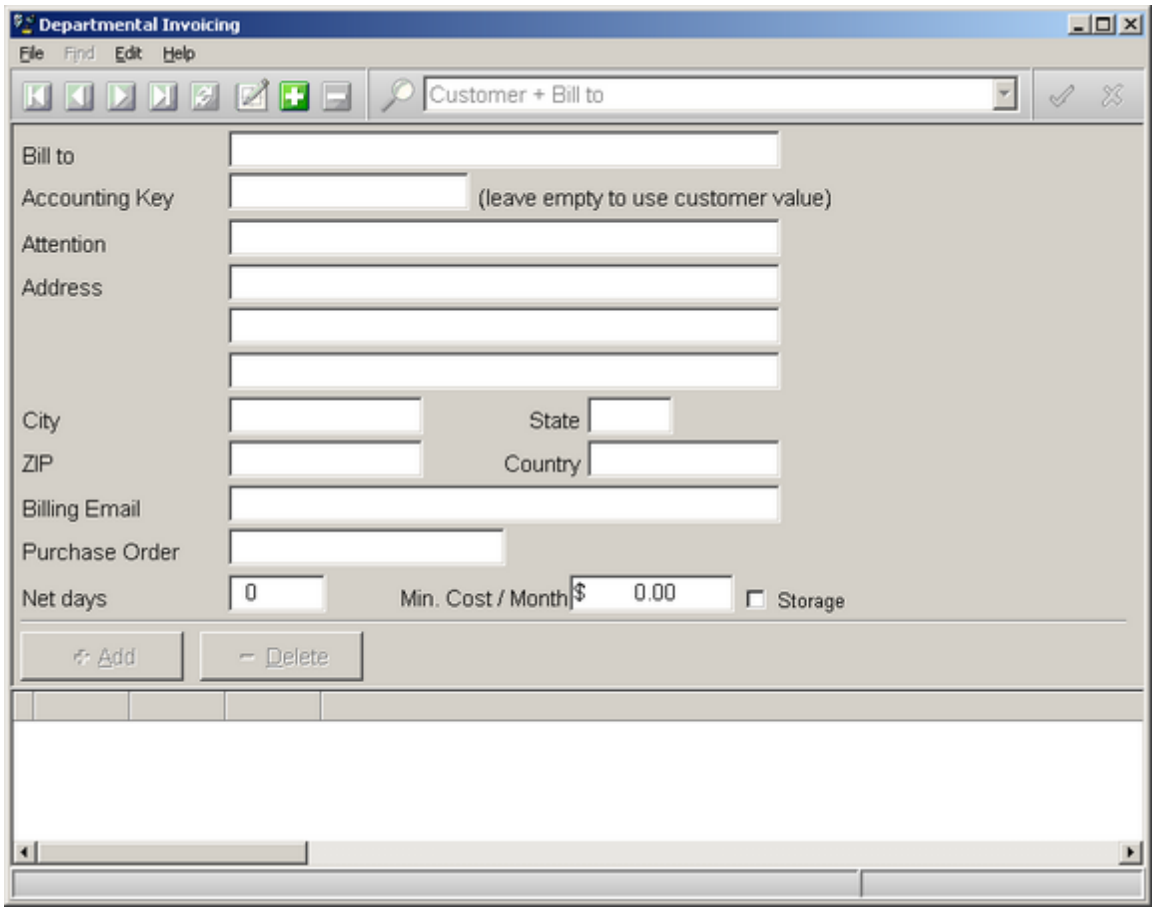

9.7.9.2 Fields (Departmental Invoicing)

Bill to
This field allows to indicate the name of the company (or division, subsidiary, etc) that will appear on the invoice.

Accounting Key

If you export your invoices[700] to an accounting system and this system uses a different key per departmental invoice for this customer, you may enter an accounting key of up to 30 characters here. If left blank, the value defined in customer information will be used.

Attention
This field indicates the name of the person to whom the invoice is sent to. It can be an individual or a service, such as account payable.

Address/City/Province/Postal Code/Country
Main address of the recipient for the invoice.

Billing email
This field contains the billing email address of the specific department (see related information in the Billing section of the Customer information module --- Invoice Format and Billing)

Purchase order
This field allows to associate a purchase order to the invoice. This procedure is common for big

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organizations.

Net days
This field allows to specify when the invoice has to be paid (maximum of days) to the record center.

Min. Cost/Month Storage
Numeric field that can contain the values "0.00" to "99999.99".
This field allows to enter a minimum amount to bill every month.

- When the Storage box is not checked, it is the minimum cost to charge for all the services, including storage.
- When the Storage box is checked, it is the minimum cost to charge for storage only, not for the other services.

Ex : For a specific customer and month, the system count 5$ for storage fees and 10$ for general fees (picking, refilling, labor, etc).

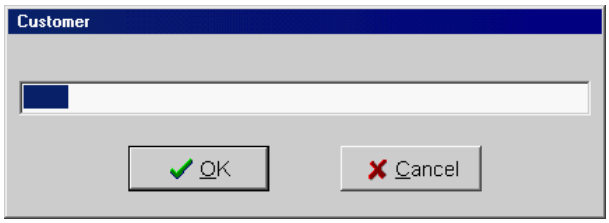
If a 20$ minimum cost is set for that customer without checking off the Rent box, he will be charged for a total amount of 20$. If the Rent box is checked off, the customer will be charged for 30$ (20$ of minimum storage fees + 10$ of general fees).

If the system has counted 30$ for storage fees and 25$ for general fees for that customer, the 20$ minimum cost would not apply. The customer should be charged for 55$.

Departments (unlabeled section)
This section allows to add or remove the departments that will be billed on this invoice. (Charges to departments that are not assigned to departmental invoices are included in the general invoice.)

9.7.9.3 Establishing the parameters of departmental invoicing for a customer

1 Click on **Accounting**->**Departmental Invoicing** from the Main window.
2 Click on **Edit**->**Add**. A window appears.



3 Enter the code of the desired customer and press **OK**.
4 Enter the desired information in the appropriate fields (see the previous section 754 for more details)
5 Establish the selection as follows :

- To add a department click on the **Add** button in the Department section. A window appears.

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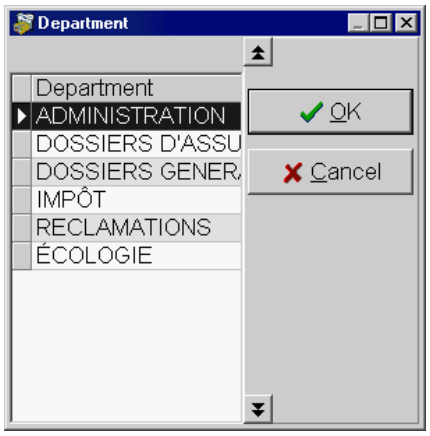


Select a department (it will appear highlighted) and press **OK**. Repeat the operation to add other departments. The departments selected here will be displayed in the Department section, at the bottom of the current module.

- To remove a department, select it in the Department section and click on the **Delete** button. The selected department will disappears from the list.

6 Click on the **Accept** button when finished.

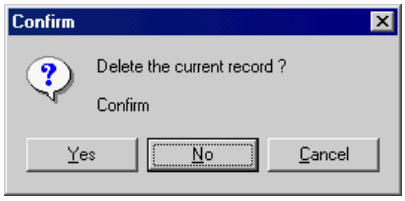
9.7.9.4 Editing or cancelling parameters of departmental invoicing for a customer

Editing a selection

1 Click on **Accounting**->**Departmental Invoicing** from the Main window.
2 Search the desired selection. When it is displayed on the screen click on **Edit**->**Edit**.
3 Edit the desired parameters in the appropriate fields (see "Fields[754] " in the current module) and click on the **Accept** button to register the modifications.

Canceling a selection

1 Click on **Accounting**->**Departmental Invoicing** from the Main window.
2 Search the desired selection. When it is displayed on the screen click on **Edit**->**Delete**. A dialog box appears.



3 Click on the **Yes** button to confirm the deletion. All the departments that were included in the selection become available for billing with the main account of the customer.

9.7.9.5 Viewing or printing the list of departments billed separately for a customer

1 Click on **Accounting**->**Departmental Invoicing** from the Main window.
2 Click on **File**->**View Report**|**Print Report**. A window opens.

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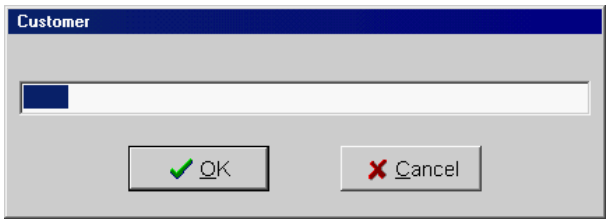

3 Enter the code of the desired customer and press **OK**. The report is printed or displayed soon after.

9.7.10 Customer Volume Usage

9.7.10.1 Overview (Customer Volume Usage)

This module provides various reports of storage volume usage.

Available reports

- See below, see the Report[501] module

Fields

- None

Distinctive menu options:

File menu

- View | Print customer volume (By cubic feet | By size)[758] Report includes storage, and amount added or removed by date.
- View | Print total volume (By customer | By box type)[760]

Module window

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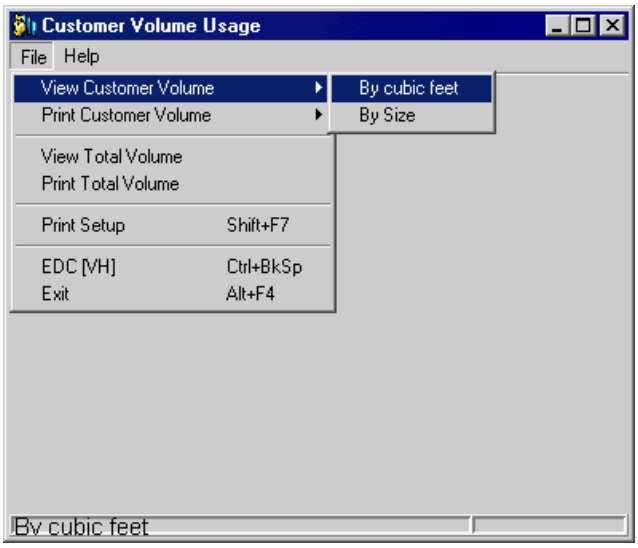
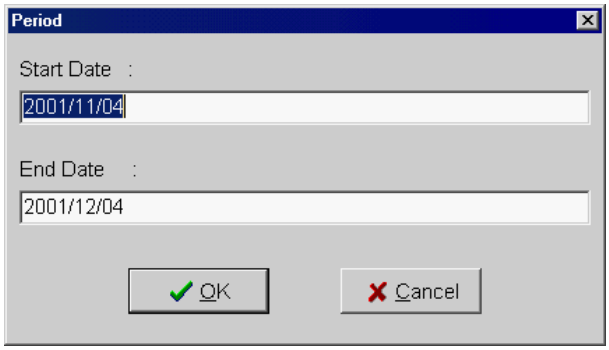


9.7.10.2 Viewing or printing volume usage for one customer

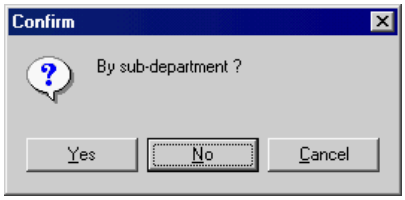
These reports allow to evaluate the space usage of each customer. It is possible to view if a customer gets different size of boxes or to know the distribution of the occupation rate between departments of a customer.

Quantity of cubic feet stored by a customer for a specific period

1 Click on **Accounting**->**Customer Volume Usage** from the Main window.
2 Click on **File**->**View Customer Volume**|**Print Customer Volume**->**By cubic feet**. A window appears and asks to specify which customer is concerned.
3 Enter the code of the desired customer and press **OK**. A new window appears.



4 Enter an interval of dates and press **OK**. A dialog box appears.



5 Click on the **Yes** button if the report must be sorted by sub-department. The report is automatically printed or displayed as follows :

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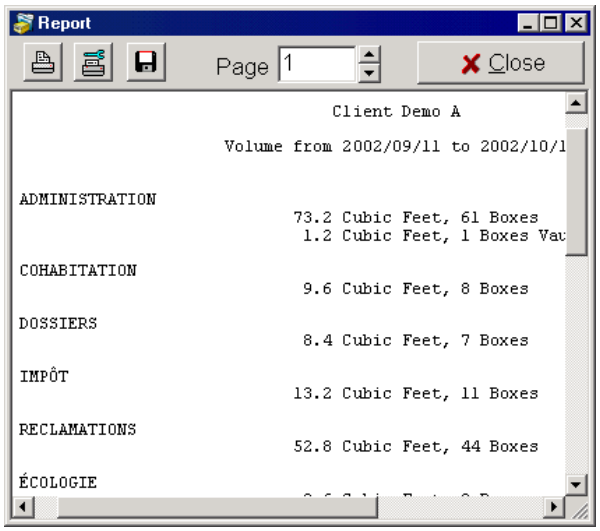
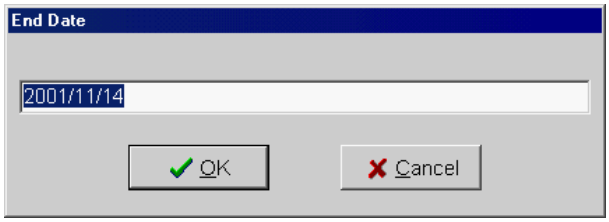


Note : The interval of dates previously entered allows to view the quantity of cubic feet added to the volume in storage since the beginning of this period. The date of the addition for the first box is specified, because it is not necessarily the start date of the period.

6 Click on the **Close** button to end the viewing.

Quantity of documents stored by a customer for a specific date, sorted by box size

1 Click on **Accounting**->**Customer Volume Usage** from the Main window.
2 Click on **File**->**View Customer Volume**|**Print Customer Volume**->**By Size**. A window appears and asks to specify which customer is concerned.
3 Enter the code of the desired customer and press **OK**. A new window appears.



4 Enter a date and press **OK**. The report is automatically printed or displayed as follows :

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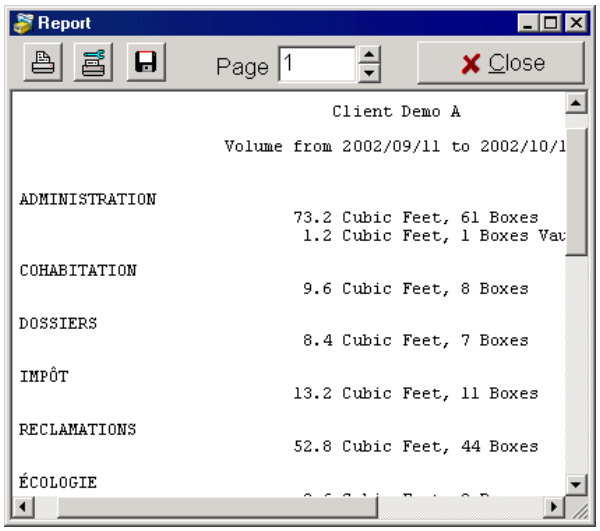
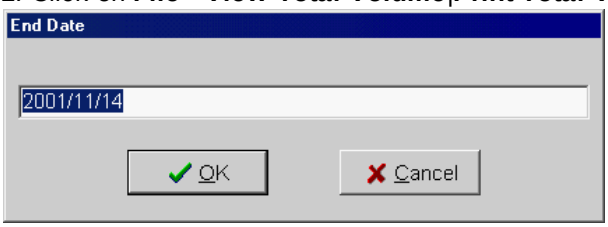


5 Click on the **Close** button to end the viewing.

9.7.10.3 Viewing or printing total volume usage

This report allows to know the total volume in storage for each customer for a specific date. This volume will be used for invoicing.

1. Click on **Accounting**->**Customer Volume Usage** from the Main window.
2. Click on **File**->**View Total Volume**|**Print Total Volume**. A window appears.



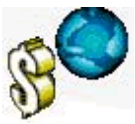
3. Enter a date and press **OK**. The report is printed or displayed on screen.
4. When viewing the report, click on its **Close** button to end the operation.

9.7.11 RimsLink Pricing

9.7.11.1 Overview (RimsLink Pricing)

The RimsLink Pricing module enables the Billing record center to map the price codes used on shared customer invoices at the Service record centers to those in use at the Billing record center. To access the module window, select a Service record center from the list.

See the procedures section for instructions on setting up RimsLink 108.



Available Reports
(None)

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Distinctive menu options

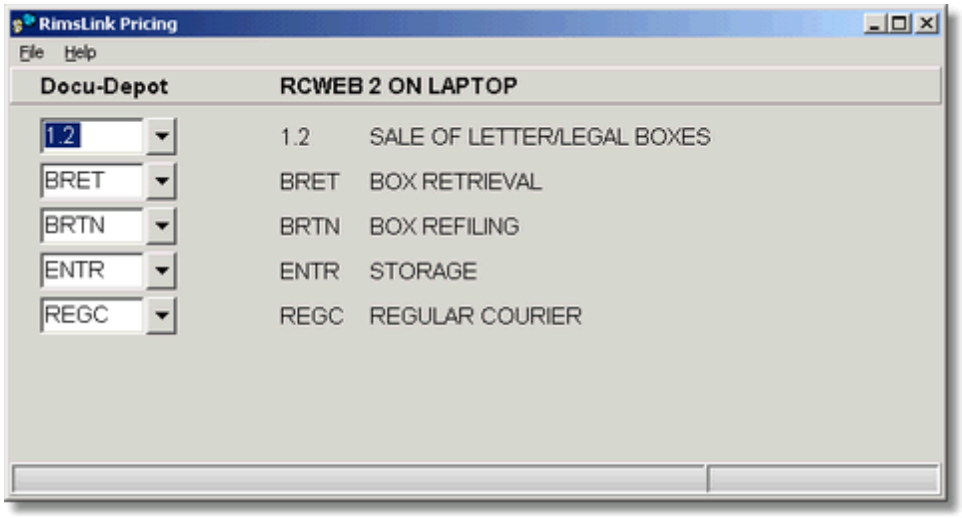
- Open Service record center[761]

Fields

The window of the RimsLink Pricing module contains a table of price codes from the invoices of customers shared with the specified record center. Each row allows you select the price code from your record center that matches the price code and description for the Service record center on the right.

- **(Column 1 - your record center)** Select the local price code to match the Service record center code in column 2
- **(Column 2 - price code from remote service record center)** Service record center price codes, with description as they appear on invoices.

Module window

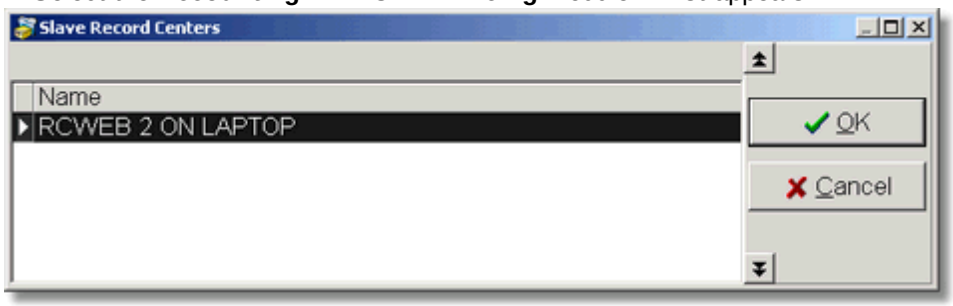


9.7.11.2 Open service record center to map pricing

The RimsLink Pricing module maps relevant price codes between the Billing record and each Service record center. Select which record center to map as follows:

From the Main window:

1. Select the **Accounting->RimsLink Pricing** module. A list appears.



2. Double-click the desired record center. If the Service record center can be contacted with the parameters entered during RimsLink setup[108], the module will open to the appropriate mapping.

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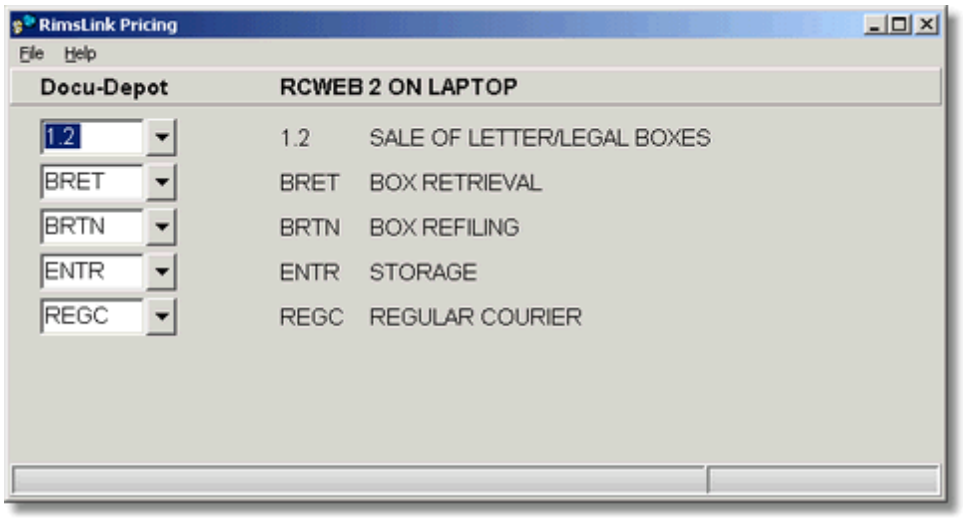

To open pricing for a different record center:

1. From the menu, select **File->Open Service record center**.

Once the correct mapping is open, click the drop-down list to select the price code from those at your record center, and click the **Okay** button to accept the change.

Note: RimsLink pricing consults the invoices at the Service record center. If the list of price codes to map is empty, verify that your partner record center has at least one invoice created for at least one of your shared customers.

9.8 Portable Data Terminal (PDT)

9.8.1 How to use the PDT

9.8.1.1 Overview (PDT)

Built to collect, display and communicate data, the PDT is used in most of the operations (ex: picking, refiling, moving and delivering items). Three PDT models are supported by EDC: the PDT 3100 (by Symbol) and the PHL 2700 and 1300 (by Opticon).

Note : Employees log on to the PDT by scanning their employee bar code[339]. This permits EDC to track when and by whom each box and file was processed.

Operations

- General points about the PDT[763]
- Picking items with the PDT[170]
- Delivering items with the PDT[175]
- Returning or adding items with the PDT[175]
- Refiling items with the PDT[182]
- Moving items with the PDT[766]

Wireless PDTs are also being introduced. The software for this is browser-based, and can be used on many more advanced smart phones and tablets that can be connected to a bar code scanner.

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It is currently possible to perform delivery packaging and truck validation with these wireless PDTs. More functionality is being developed.

9.8.1.2 General points about the PDT

Useful keys

- **CLEAR/ESC** Return to the main menu
- **BK SP** Delete characters
- **SPACE/SP** Insert space between 2 characters

Selecting a menu, a sub- menu or a function (menu item)

Menu and sub-menus

The menus and the sub-menus are displayed vertically and are preceded by a number (ex : **1-Receive lists**, **2-Send results**, etc). To select a menu or a sub-menu, it is only necessary to press the key of the related number.

Functions

Functions (menu items) are displayed on the same line in an abbreviated form and are also preceded by a number (**1Prv**, **2Nx**, etc). The functions are accessible when a menu and a sub-menu have been chosen and when an item is being processed. To activate a function, it is only necessary to press the key of the related number. In some situations, it can be necessary to press also the **ENTER** key.

Main menus and sub-menus

MENUS

1. **Receive** : allows to download data from a workstation to the PDT.
2. **Send results** : allows to upload to a workstation data that has been processed with the PDT.
3. **Processing** : allows to process data that has been or will be uploaded to the PDT.
4. **Utilities** : allows to view the information about the PDT, to reset deliveries, to define the number of scans, to test the bar code reading, to select a mode of communication, to select a bar code type and to select a printing mode.
5. **Log out** : allows to log out from the PDT and to login has a new user by scanning the personal bar code[339] (defined in the Employee module).

SUB-MENUS (when selecting Processing **or** Send Results **in the main menu)**

1. **Picking** : allows to pick items.
2. **Refile** : allows to refile items.
3. **Move** : allows to move items.
4. **Delivery/Ret** : allows to deliver or to return items, as well as add new boxes and files.
5. **File refile** : allows to refile inventoried and non track files.
6. **Truck Val.** : allows to perform a truck validation
7. **Pallet Pick.** : allows to pick a pallet (when using By-Pallet destruction[189])
8. **Pallet Verify** : allows to verify a pallet (when using By-Pallet destruction[189])

The lists and the list items

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Display of the lists

The lists downloaded and processed with the PDT are displayed vertically and are split into 4 columns.
The 1st column indicates the number granted to the list which allows the selection of that list.
The 2nd column indicates the floors (or sections) where the items are located.
The 3rd column indicates what types of items are present on the list (B : box or tape - F : file - OS : open shelf file, etc).
The 4th column indicates how many items are contained on the list.

Indications of the list items

- Box (or tape) : location/customer code/box (or tape) number/RC number of the box (or tape).
- Inventoried file : location/customer code/box number/RC number of the file.
- Non track file : location/customer code/box number/RC number of the non track.
- Open shelf file : location/customer code/RC number of the file.

9.8.1.3 PDT Utilities

This menu is particularly useful to perform tests on the PDT, to correct mistakes and to set options.

Viewing the information of the PDT

The information about the PDT is organized in a certain way: the first line refers to the version of the PDT (ex: V 2.16); the second line gives the current date and time, and the third line gives the amount of memory that the PDT contains.

1 Go in the Utilities menu (**4- Utilities**)
2 Go in the Information sub-menu (**1- Info**)

***Resetting a delivery**

This sets the items of a delivery as 'not delivered'. This was made so that drivers could do a verification without using the truck validation. The driver would scan the items on his truck (See Delivering items with the PDT 175) to make sure everything was there, arrive at the client's facility, reset the delivery and rescan the delivery items.

1 Go in the Utilities menu (**4- Utilities**)
2 Go in the Reset Delivery sub-menu (**2- Reset Delivery**)
3 Enter the delivery number and press **Enter**.
4 The delivery will automatically be reset.

Defining the number of scans

The number of scans a PDT performs defines the margin of error; example, if a PDT verifies a bar code twice, then the margin of error will be smaller than if the PDT only verifies the bar code once. In brief, it means that the PDT will compare the two scans before accepting the item as the right one.

Note: The amount of time the PDT takes to scan will not change drastically, since the verification is very quick.

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1 Go in the Utilities menu (**4- Utilities**)
2 Go in the Scan count sub-menu (**3-Scan count**)
3 Enter the number of scans (choose a number between 1 and 2).
4 The number of scans will automatically be changed.

Testing the bar code reading

This option is useful when testing the PDT to see if it can read the different bar codes.

1 Go in the Utilities menu (**4- Utilities**)
2 Go in the Scan count sub-menu (**4-Read bar code**)
3 Read the bar code and compare the bar code displayed on the screen with the bar code you have just scanned.

Show alternate location label

This option is useful is you are transitioning from one location addressing scheme to another. Note that it is possible to toggle back and forth between showing the different location labels even after picking lists have been downloaded to the PDT.

1 Go in the Utilities menu (**4- Utilities**)
2 Go in the Show Alt Location sub-menu (**4-Read bar code**)
3 Press **1** for Yes if you wish to display the alternate location, **0** for No if you wish to display the EDC location.
4 When they exist, the alternate location will be displayed instead of the EDC location.

Setting the bar code symbology

This option is only useful when the record center has alternate labels with the '2 of 5' bar code symbology, by default, EDC uses the '3 of 9' symbology. This enables the user to select the length of the bar codes used (PHL2700 only).

1 Go in the Utilities menu (**4- Utilities**)
2 Go in the Min 2of5 length menu (**5-Min 2of5 length**)
3 The default used for the length of the bar code is 6. To change that length, enter the new value (Ex: 7) and press **Enter**. The PDT goes back to the main menu.

Selecting a mode of communication (only for PHL 2700-80 model)

This option is mainly used when the mode of communication needs to be changed often (if the facility has cables and cradles at its workstations) or for the initial set up of the PDT. Also, when the batteries are changed, the PHL is set for cable communication by default, so one needs to set this parameter, especially if the communication is mainly done with cradles.

1 Go in the Utilities menu (**4- Utilities**)
2 Go in the Cradle/Cable menu (**6-Cradle/Cable**)
3 Press **(1)** and **Enter** to choose the communication by Cradle and **(2)** and **Enter** to choose the communication by Cable.

Note: The default is always set to **Cradle** communication.

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Setting the printer communication mode

This option is only of assistance when the portable O'Neil printer is used. It enables you to set the communication mode of the printer, whether it is via cable or infra-red port (PHL2700 only).

1 Go in the Utilities menu (**4- Utilities**)
2 Go in the Min 2of5 length menu (**7-Print IrDA/Cable**)
3 To select the communication via infra-red port, press **(1)** and **Enter**. To select the communication via cable, press **(2)** and **Enter**.

Note: The default is always set to **Cable** communication.

9.8.1.4 Moving items with the PDT

Moving items

Items are moved from one location to another in the warehouse using the PDT to track move lists.

Routine moves are uploaded to the Return verification module. Larger moves may be performed using the Internal Transfer List module, while moves between the warehouse and the vault must be uploaded as Vault Transfers in the Box and File Maintenance module.

1. Select **3-Processing->3-Move**.
2. Select **4-On Shelf** if you want to move boxes or open shelf files, **5-In Box** if you want to move files.
3. Scan the bar code of the new location, then scan all the items to be transferred in that location.
4. When the last item for the location has been processed, scan the new location again to close it.
5. Repeat steps 3 and 4 while moves of this type remain.
6. Select **0 (Qui)** to quit.
7. Upload the move list to the appropriate module in EDC RC by selecting 2-Send results->3-Move.

- Routine moves are uploaded to the Return Verification module (see the section "Uploading a move list from the PDT[660]")
- To move items between regular storage and vault[441] , or resize boxes[442] that have previously been sized, use the appropriate option in the Box and File Maintenance module.
- Special functions are also available for uploading move lists when processing an internal transfer lists (See "Transferring documents from a location to another[577] "), and when rescanning the warehouse in order to correct inventory (see the section on "Uploading a Rescanning move list[407] ").

Note: It is possible to move a box or an open shelf file from one transit location to another.

10 Appendix

Workflow of outgoing and incoming items (PDT only)[770]
Delivery and order statuses[771]
Integrity verification workflow: Box delivery[772]
Integrity verification workflow: Box return[773]
Activity codes[773]
Importing data[779]
Create a data file[779]

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Create a description file 781
Examples of description files 786
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Other examples of data and description files 798
Importing in_house items and locations 818
List of related applications 819
Tables 821
Exporting an EDC report into Excel 837
Disposal list workflow 838
Interpreting warnings and error messages 839
Item states 840

10.1 Expressions for use in reports

```
Count of items from a table:
Notes on reports:
- If you just want a “count” from a table, it is faster to include this as an expression rather th

Translating return item types:

if(return_item.itemtype=1,'Box Return',
if(return_item.itemtype=2,'FileReturn' ,
if(return_item.itemtype=3,'NonTrackFileReturn',
if(return_item.itemtype=4,'BoxAddition',
if(return_item.itemtype=5,'Interfile',
if(return_item.itemtype=9,'NonTrackedIFile',
if(return_item.itemtype=11,'FileAddition',
if(return_item.itemtype=12,'OpenShelfReturn',
if(return_item.itemtype=13,'OpenShelfAddition','Other)))))))))

if(return_item.itemtype=1,'Box',if(return_item.itemtype=2,'File',if(return_item.itemtype=4,'New Bo
```

10.2 Sample division and timing of labor at a record center

Sequence \ Role	Operations manger	Warehouse worker	Drivers	Customer service
Prior to event	• Plan and delegate work	• Pick rush orders	• Load and validate deliveries on to vehicle	• Place phone and e-mail orders by picking cut-off
Between events	• Work in warehouse • Handle exceptions	• Return and shelve items. • Process disposal lists. • Perform indexing and other projects.	• Perform deliveries	• New account set-up and training. • Run imports, reports, searches, etc.
Following event	• Create deliveries and routes after picking is complete. • Reconcile process error, not verified returns, orders not closed	After picking cut-off • complete final pick of items	• Return items to warehouse	

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	• Add billing adjustments to deliveries • Schedule daily tasks			

10.3 Delivery states

Delivery Status	Meaning	Action
Created	The delivery has been created and assigned a delivery number. One or more orders have been assigned to this delivery number. Once a delivery is created, any new orders would be assigned to a new delivery number, even if they are heading to the same address with a compatible delivery type.. For rush delivery types (with by time or 24 hour ship mode), the delivery is created immediately. For other delivery types, EDC RC attempts to close the delivery as part of the delivery creation process. You will therefore only see the *Created* status if the delivery could not be closed, usually because the picking for an order on the delivery is not completed.	Complete the picking of the order. For by time and 24 hour deliveries, delivery creation occurs automatically. For other deliveries, repeat delivery creation
Closed	If a delivery is *closed*, the picking is complete and the delivery creation was successful. It is still possible to add last minute items to the delivery directly through the delivery module.	For deliveries by the record center, create delivery routes and perform truck validation
On Truck	The last action performed on the delivery was that it was successfully validated to the truck.	If you deliver with the PDT, download the list of deliveries to the PDT through the delivery route. Perform the delivery and return with the PDT, or perform the return through the return delivery module.
Delivered	EDC RC knows that the delivery has been performed, but the delivery is not fully returned. There may have been errors during the return process, or the user may have answered '*No*' when asked if the return was complete.	Complete the return, responding '*Yes*' when asked if the return of the delivery is complete. If there were errors on the return, investigate.
Returned	All items incoming items on the delivery have been returned to the record center. At least one box or file is still in a transit or holding location.	Refile incoming files Move boxes out of transit and holding locations.

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	This may (When creating a non-blank invoice, you will be warned if any deliveries for the service period are not at least returned, and the invoice will not be created.)	View the items not returned list to identify errors encountered or items not scanned.
Verified	If the delivery is verified, all items on it have been scanned out of transit locations. This does not affect your invoicing or customer service, but it is important for keeping your record center well organized.	

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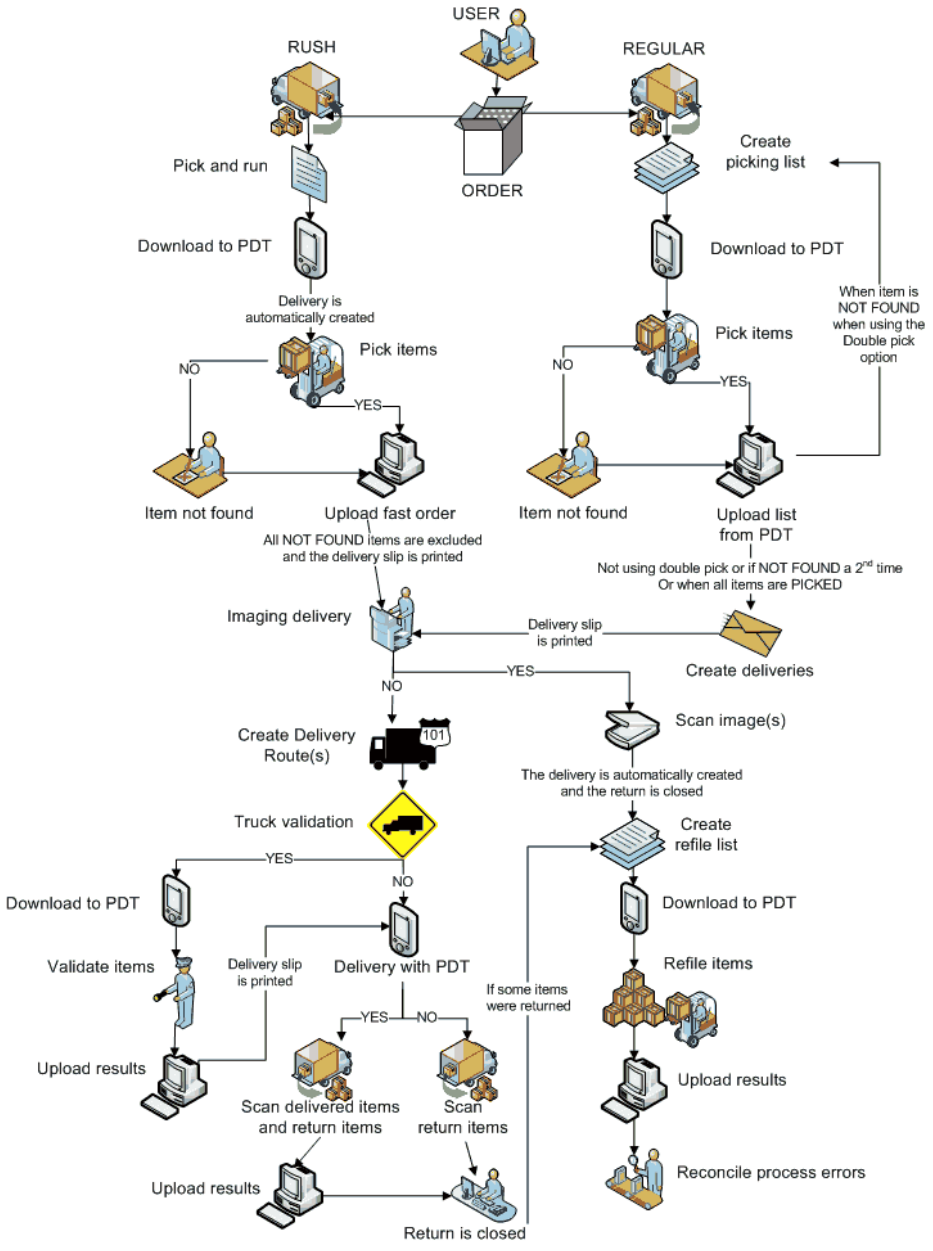
10.4 Workflow of outgoing and incoming items (PDT only)



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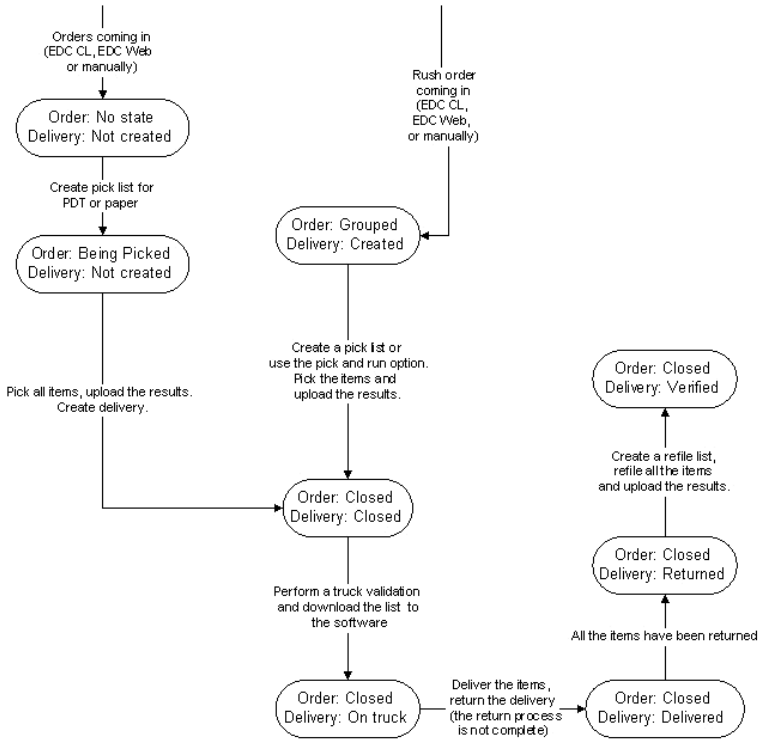
10.5 Delivery and order statuses


Orders coming in (EDC CL, EDC Web or manually)
Order: No state Delivery: Not created
Create pick list for PDT or paper
Order: Being Picked Delivery: Not created
Pick all items, upload the results. Create delivery.
Rush order coming in (EDC CL, EDC Web, or manually)
Order: Grouped Delivery: Created
Create a pick list or use the pick and run option. Pick the items and upload the results.
Order: Closed Delivery: Closed
Perform a truck validation and download the list to the software
Order: Closed Delivery: On truck
Deliver the items, return the delivery (the return process is not complete)
Order: Closed Delivery: Delivered
All the items have been returned
Order: Closed Delivery: Returned
Create a refile list, refile all the items and upload the results.
Order: Closed Delivery: Verified

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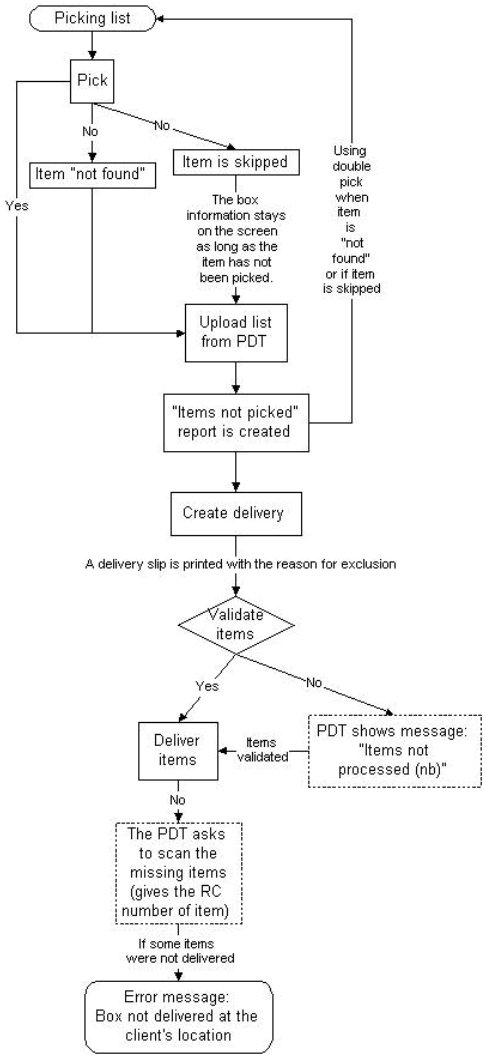
10.6 Integrity verification workflow: Box delivery


Picking list
Pick
No
No
Item "not found"
Item is skipped
Yes
The box information stays on the screen as long as the item has not been picked.
Using double pick when item is "not found" or if item is skipped
Upload list from PDT
"Items not picked" report is created
Create delivery
A delivery slip is printed with the reason for exclusion
Validate items
Yes
No
Deliver items
Items validated
PDT shows message: "Items not processed (nb)"
No
The PDT asks to scan the missing items (gives the RC number of item)
If some items were not delivered
Error message: Box not delivered at the client's location

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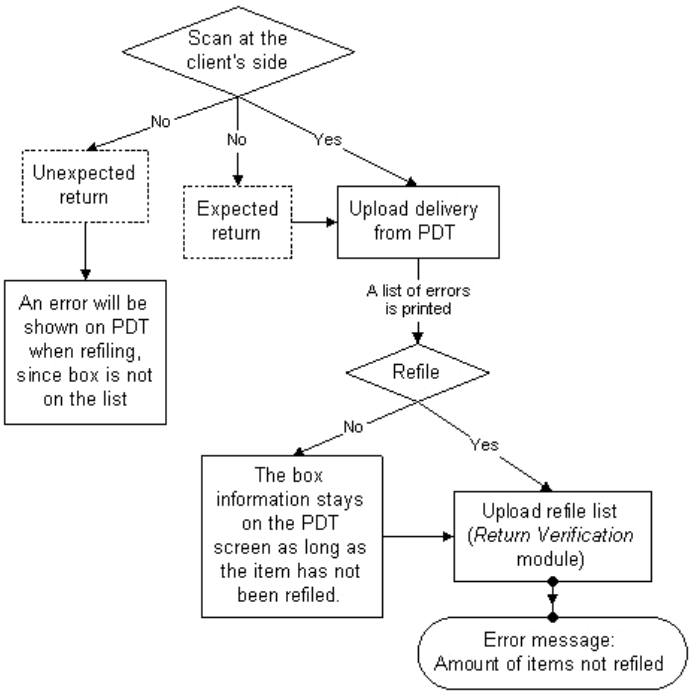
10.7 Integrity verification workflow: Box return


Scan at the client's side
No
No
Yes
Unexpected return
Expected return
Upload delivery from PDT
An error will be shown on PDT when refiling, since box is not on the list
A list of errors is printed
Refile
No
Yes
The box information stays on the PDT screen as long as the item has not been refiled.
Upload refile list (Return Verification module)
Error message: Amount of items not refiled

10.8 Activity codes

***Box/File history**

Activity

In	= 1; file or box currently In
Out	= 2; file or box currently Out
Selected	= 3; file or box selected for order entry
Reserved2	= 4; reserved for future usage
PreAdd	= 5; file or box is in Pr Add
OnDispList	= 8; file or box is on a disposal list
OnTransList	= 9; file or box is on a transfer list
OnDelList	= 10; file or box is on a deletion list
Deleted	= 11; box or file deleted (removed from active inventory)
Destroyed	= 12; box of file destroyed (shredded) and removed from active inventory
Transferred	= 13; box or file transferred to other location or company and removed
In_InHouse	= 14; file or box in, at the clients in-house facilities
Out_InHouse	= 15; file or box out, at the clients in-house facilities
Destroyed_InHouse	= 27; file or box destroyed in house
Printed_InHouse	= 32; file label has been pre-printed on client side
Sampled	= 35; box or file Sampled (removed from active inventory)
Revised	= 36; box or file Revised (removed from active inventory)
SentToDepot	= 37; box or file Sent to Depot (removed from active inventory)

(Boxes with activities 1, 2, 3, 8, 9, and 10 are billed for storage.)

***History**

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Moved = 6; file or box was moved
Searched = 7; file or box was searched
DeptChange = 16; department of box or file has changed
NumberChange = 17; box or file number has changed
DescChange = 18; box or file description has changed
TypeChange = 19; box or file type has changed.
AccessLevelChange = 20; box or file access level has changed
DispositionChange = 21; box or file disposition changed (date or disposition type)
VolumeChange = 22; box volume change
BoxChange = 23; cardboard box change. For boxes only
PreAddDeletion = 24; "invisible" history added when a pre add box/file is deleted at a
ImagesScanned = 25; images have been scanned within a file
OnInternalTxList = 26; box is being moved to a new location
VaultTransition = 28; box InVault field has changed
Picked = 29; box or file has been picked
Refiled = 30; box or file has been refiled in the active inventory
UserField6Change = 31; box user field 6 has changed
GeneralChange = 33; some other field changed
ChangeOfHands = 34; When recipient changes at the client site. This history is used to synchronize the change with the record center.
OnInternalTxList = 38; box or file Item set has changed.
Added = 39; First time a box is added at the record center
AltLabelChange = 40;
ExtraFieldChange = 41; (applies to files)
ImagePasswordChange = 55;
ReturnScheduleChange = 56; Change in rotation schedule
ImageIndexChange = 57;
ImagesViewed = 58;
AllImagesDeleted = 59;
NotesChange = 60; { notes have changed. }
KeywordsChange = 61; { keywords have changed }
Imported = 62;
Document Deleted = 63
Excluded = 64
PickedUpAtClient = 65
FileInBoxReturned = 66; With file in box tracking, the file was scanned on return of the containing box.
FileInBoxNotReturned = 67; With file in box tracking, the box was return without scanning this file.

Emptied = 68; A shredding container was emptied. (Rotations involve activities 1 and 2 for in and out)

BoxImageUpdated = 69
FileImageUpdated = 70
BoxImageViewed = 71
FileImageViewed = 72

Documents

Editable = 42; { can be checked out for edition }
InEdition = 43; { is checked out for edition }
Finalized = 44; { cannot be modified, for consultation only}

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Viewed = 46;
Locked = 47;
VersionAdded = 48;
Unlocked = 49;
Modified = 50; { meta-data modified }
Emailed = 52; { document was extracted for purpose of emailing }
UnFinalized = 53;
Pasted = 54;

In-house items

Printed_InHouse = 32; { file label has been pre-printed on client side }
In_InHouse = 14; { file or box in, at the clients in-house facilities }
Out_InHouse = 15; { file or box out, at the clients in-house facilities }
Destroyed_InHouse = 27; { file or box destroyed in house }
Electronic = 51; { Physical activity for records that have only an electronic from }
ElectronicAdded = 45;

Destruction type

NonConfidential = 0; destroy document non-confidentially
Permanent = 1; keep the document permanently
Confidential = 2; destroy document confidentially
Sample = 3; take a sample from the document, and destroy the remaining documents in a separate step, either confidentially or not.
Revision = 4; the document must be recalled to the proper authority (i.e., a lawyer) before destroying.
SendToDepot = 5; send the document to next depot; an active record goes to an off-site record center, a semi-active record goes to a permanent archiving area.
NullDisposition = 6; the disposition is not determined.

***Delivery**

State

Created = 0; neither closed nor returned, grouped
Closed = 1; delivery has been shipped.
Returned = 2; delivery return items have been put on a return
Verified = 3; delivery refiles have been verified.
Delivered = 4
On truck = 5; truck validated before delivery

History

Created = 1
Closed = 2
Returned = 3
Verified = 4
Reopened For Delivery = 5
Reopened For Return = 6
Delivery Type Change = 7

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Delivery Address Change	= 8
Images Scanned	= 9
Delivered	= 10
Building Change	= 11
Truck Validation	= 12

***Order**

State

NotProcessed	= 0; neither being picked nor closed.
Being Picked	= 1; picking list has been created.
Grouped	= 2; orders have been grouped into deliveries.
Closed	= 3

Order Item

Item State

To be picked	= 0
Being picked	= 1; Has been printed or uploaded to a PDT
Picked	= 2; Has been confirmed from a download from a PDT
To be picked again	= 7; When using the double pick option, it will appear in the picking list
Being picked again	= 8; When using the double pick option, has been printed or uploaded to a PDT
Excluded	= 4; Has been excluded when doing the delivery verification
Delivered	= 5; Delivery has been confirmed when using the delivery with PDT option

**Item Type*

Other	= 0
Box	= 1
File	= 2

***Employee statistics (Also applies to return items)**

Operation Type

Retrieved	= 0
Refiled	= 1

Item Type

When Operation Type = 0

Box	= 0
File	= 1
NonTrack	= 2
Misc	= 3
ShelfFile	= 5
NonPickable	= 6

When Operation Type = 1

BoxReturn	= 1
FileReturn	= 2
Non Track File Return	= 3
BoxAddition	= 4
Tracked InterFile	= 5

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Surcharge	= 7
Labour	= 8
Non Tracked InterFile	= 9
Non Track Deletion	= 10
File Addition	= 11
Open Shelf Return	= 12
Open Shelf Addition	= 13
Shredding Bin Return	= 14
Shredding Bin Emptying	= 15
Transport container	= 16
Empty transport container	= 17

Invoice Item

ItemGroup

Storage	= 1
Labour	= 2
Courier	= 3
Inventory list	= 4
Imaging	= 5
Open shelf	= 6
Shredding/Recyc	= 7
Supplies	= 8
Miscellaneous	= 100

***Pallet list**

State

Authorized - Verified or unprocessed	= 0
Authorized - Being picked	= 1
Authorized - Picked	= 2
Destroyed	= 3

***List**

ListType

Destruction	= 0
Transfer	= 1
Deletion list	= 2

Status

Created	= 0
Destroyed	= 1
Locked	= 2
Destroyed	= 3
Authorized	= 4
Destroyed	= 5
Authorized	= 6
Destroyed	= 7

***List Item**

Pick State

Unprocessed	= 0
BeingPicked	= 1
Picked	= 2
Verified	= 3

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***Delivery Route**

State

Created	= 0
On Truck	= 1
Delivered	= 2
Unloaded	= 3

***Delivery Type**

Courier

Record center	= 0
External	= 1
Fax	= 2
Imaging	= 3

ShipMode

Regular	= 0
By Date	= 1
By Time	= 2
24 hours	= 3
Half day rush	= 4

***Price**

Unit Type

Units	= 0
Minutes	= 1
Cubic feet	= 2
Megabytes	= 3
Linear feet	= 4

Invoice Heading (Group)

STORAGE	= 1
LABOR	= 2
COURIER	= 3
INVENTORY LIST	= 4
IMAGING	= 5
OPEN SHELF	= 6
SHREDDING/RECYCLING	= 7
SUPPLIES	= 8
MISCELLANEOUS	= 100

***Customer Price**

Tax calculation

Tax A only	= 0
Tax B only	= 1
Tax B on tax A	= 2
Not Taxable	= 3

Break

None	= 0
Standard	= 1
Tiered	= 2

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***Customer**

Billing Type

Regular	= 0
Charge back	= 1
Department	= 2

Courier billing

Container	= 0
Round Trip item	= 1
Delivery	= 2
Item	= 3
By Item type	= 4
Item round trip	= 5

10.9 Importing data

Importing data is useful when transferring data for existing customers from another records management software into EDC RC. (An import wizard[430] exists for adding or updating box and file information.)

Information can be imported to the File, Box, DocumentType, Buildings, BusinessType, Customer and Space tables.
Given a file containing data, EDC uses a description file to determine which fields to put where.

1. Create a data file[779] (the data can be created in csv, xls, or txt formats)
2. Create a description file[781] (the description file must be done in the txt format)
3. Before importing the entire data, perform a test with a data file containing only one or two boxes|files, etc. and import the data into the software[430].
4. Verify if the information that was imported is correct (one can do this manually or in the Box and File Verification module[393] - this last option is only for boxes and files).

WARNING

This operation cannot be undone. Performing a back up of the database is highly recommended before going any further. This should be done in case boxes or files are added by mistake, or if the import is done to modify the information of many boxes or files.

It is always recommended to do an import of one or few entries, before performing the actual import. This is done to make sure that mistakes in the Excel or CSV sheets can be caught before the actual import occurs.

10.9.1 Create a data file

Conditions:

- The data file must follow the formatting specified in the table section of the description file it is

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associated to (see Create a description file[781]).

- The data must begin on the first line.
- Each record entry should start on a new line.
- The data file should contain the actual values of the fields later specified in the fields section of the description file.
- The values will be matched to their corresponding fields in the order listed in the description file.

How to create a data file:

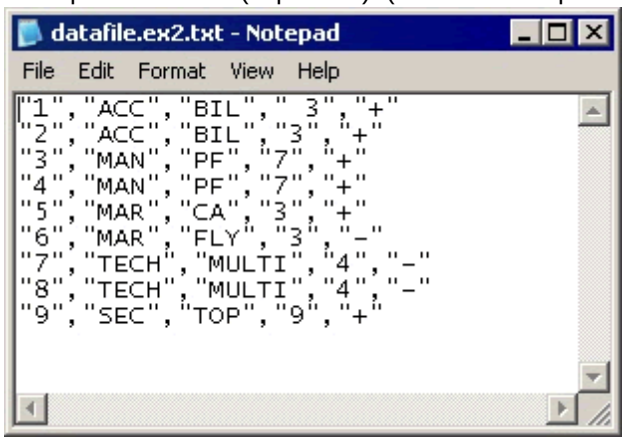
1. Determine the Fields in which the information will be imported (ex: Box number, Department, Type, etc.)
2. Enter the different information related to those fields.

- If it is a MS Excel file (xls format): separate the various information by column.
- If it is a Notepad file (or another software) (txt format): separate the different information with a tab, a comma (or any other character) or separate the different information by column.

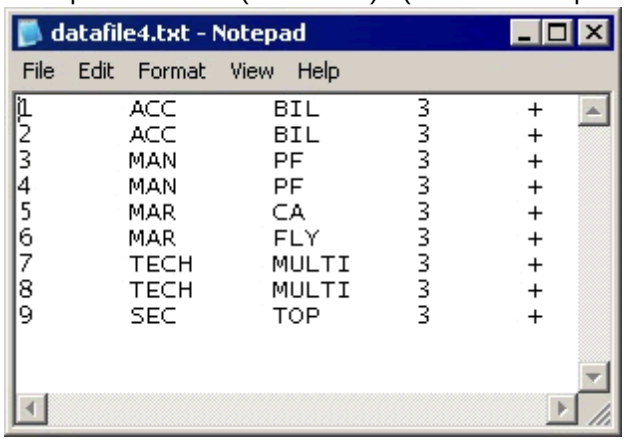
Example of an Excel data file: (see its description file in the Examples[786])

	11	Jean-Marc Girard	ACC	Bills	13/07/2004	BIL	0	13/07/2006	13/07/2004	+	23 Laurier	3	AAA
	22	John Mayer	MAN	Personal files	13/07/2004	PF	2	13/07/2006	13/07/2004	+	23 Laurier	9	BBB
	33	John Lincoln	WEE	Web pages	13/07/2004	MULTI	4	13/07/2006	13/07/2004	-	23 Laurier	4	CCC

Example of a txt file (separated) :(see the description file in the Examples[788])



Example of a txt file (fixed width) : (see the description file in the Examples[789])


datafile4.txt - Notepad
File Edit Format View Help
1 ACC BIL 3 +
2 ACC BIL 3 +
3 MAN PF 3 +
4 MAN PF 3 +
5 MAR CA 3 +
6 MAR FLY 3 +
7 TECH MULTI 3 +
8 TECH MULTI 3 +
9 SEC TOP 3 +

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10.9.2 Create a description file

A description file, as explained earlier, is used to pinpoint the location of the information one wants to import. It also pinpoints the final location (in the software) of the imported information. Description files must be in txt format.

Outline:
1. A description file is composed of one or more table descriptions, where each table description begins by BeginTable and ends by EndTable.
2. One table description consists of a table section and a fields section.
3. Each section is described by keywords, where each keyword is followed by a user-defined or predefined value(s) and operations.
4. The order of the keywords within each section is irrelevant.
5. The keywords are not case sensitive.
6. In the description and data file, all field values are case sensitive.

Terminology: (see the Examples[786] in the next topic)
Version: The version number of the importation process must be declared before the first **Begin Table**. It is optional and does not affect the import process.

DataFileName: The name of the file containing the data (see Create a data file[779])

FieldsIDType: This specifies how the fields will be identified in the description (**FieldID**) and in the data file. One can choose between:

Column: This is specified when the column numbers are put in the **FieldID**. This is the only option for fixed width data files.

Name: This is specified when the names are put in the **FieldID**. When this field is defined, all the field columns must have a name in the data file.

FileType: This specifies the structure or the type of the data file. One can choose between:

Separated: This field applies when some specific character like a tab, a comma or any other character separates the field values in the data file. In this case the separator and a delimiter character must be defined in the description file (see **Separator** and **Delimiter**).

FixedWidth: This field applies when the field values in the data file are grouped in a column that occupies a fixed width. In this case the starting and ending position of each column must be specified for each field (see **ColumnStart** and **ColumnEnd**). For this particular field, the only possible value for **FieldsIDType** is Column. Yet, the Column numbers do not have to be sequential.

Excel: This field applies when the data file is a MS Excel file. A sheet number must be specified under **SheetNumber** (for the moment the only sheet number supported is the number 1).

Separator: This field is only used when the **FileType** is defined as Separated. It represents the character used to separate the field values in the data file. It is a simple, case sensitive, non-empty character that must be defined when used.

Delimiter: This field is only used when the **FileType** is defined as Separated. It represents the character to put before a separator, so the separator will be interpreted as a normal character within a string. It is a simple, case sensitive, non-empty character that must be defined when used.

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Ex: If the **Separator** is (,) and the **Delimiter** is (") then the expression "First,field","Second,Field" is interpreted as two fields, not four.

SheetNumber: This field is only used when the **FileType** is defined as Excel. It specifies the sheet number of the table's data (for the moment the only sheet number supported is the number 1).

TableName: This specifies the name of the table from which the information will be imported into EDC RC. Table names are case sensitive. Only data from the following tables can be imported: File, Box, DocumentType, Buildings, BusinessType, Customer.

DefaultEDCFieldValue: Specifies a default field value, which will be inserted in every record of the specified table. This operation can be repeated more than once in the Table Section but cannot be duplicated.

*Table key fields cannot be given default values.

This field must be followed by: <EDC field name>(<default value>,<mask>)
<EDC field name> specifies a specific EDC field name of the current table.

If the default value is a date or time then a comma and a mask must follow it. If a comma is part of the default value or mask, use another comma as delimiter.

Ex:
DefaultEDCFieldValue StartDate(2003/12/13,yyyy/mm/dd)
DefaultEDCFieldValue StartDate(2003,,12,,13,yyyy,,mm,,dd)

BeginField: This delimits the beginning of a field description; a field description must be done for every table field (ex: one for MainDeptName, one for CustBoxNo, etc.)

ColumnStart: This is used when the **FileType** is FixedWidth. It represents the starting horizontal position of the field value in the data file (the minimum value is 1).

FieldID: This specifies the table's field to be described. This can be the field's column number or a name found in the data file (see **FieldsIDType**). The field name is case sensitive and the minimum column number is 1.

EDCFieldName: This is the name of the EDC field to which the currently described field corresponds. It must be a valid EDC field name and is thus case sensitive (it cannot have been declared as default before, because if more than one table field is mapped to the same EDC field name, their values will all be concatenated (linked) after the conversions have been done).
*If an EDC field name is not written properly, the software will not recognize it and will not import the related data (an error message will not appear either.) See the EDC Field Names 790 section of the chapter.

FieldType: This specifies the type of the field as it is in the data file; it should match the actual field type in EDC RC as well. One can choose between:

Number: This applies when the possible values are numbers

Alpha: This applies when the possible values are alphanumerical strings.

Date: This applies when the possible values are dates, in this case a date mask must be specified (see

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DateMask.)

Time: This applies when the possible values are times, in this case a time mask must be specified (see **TimeMask**.)

Boolean: This applies when the possible values are true or false (yes or no) ; in this case the values written in the data file must be (+) or (-) .

DateMask: This specifies the structure of the Date in **FieldType**. If a year is represented by two digits then an epoch must also be specified (see **Epoch**.)

Ex: yyyy/mm/dd

Epoch: This specifies a two digit integer used to determine a date prefix, so that all two digits dates below the epoch value will be assigned a prefix 20, and all two digit dates above the epoch value will be assigned a prefix 19.

Ex: If the Epoch is set to 80 and the Date is set to 04/05/05, then the software will put 2004/05/05 for the date when doing the importation.

Note: Specifying an epoch is optional if the imported dates have 4-digit years.

TimeMask: This specifies the structure of the Time in **FieldType**.

Ex: hh/mm/ss

ConversionType<(value1,value2)>
This specifies how the current field's value should be modified (if needed). Many conversions can be performed on a single field value. The conversion can be placed anywhere between 'BeginField' and 'EndField' in the description file. When 2 values are needed, a comma must separate them. When a comma is part of a value, one should delimit it with another comma.
Ex: Conversion Replace(old,,String,new,,String) will replace string 'old,String' with 'new,String'

Here are the various possibilities:
Conversion PadLeft(Length, Char): The field's value will be padded to the left with char, for a total length of Length. If Length is smaller than the length of the field value, the field value will not change.

Ex: If a field's value is '6', after PadLeft(4, 0), it will be '0006'

Conversion PadRight(Length, Char): Similar to PadLeft, but the padding is added to the right.

Ex: If a field's value is '6', after PadRight(4, 0), it will be '6000'

Conversion Uppercase: The field's value will be converted to upper case letters.

Ex: If a field's value is 'Hello!', after Uppercase, it will become 'HELLO!'

Conversion Lowercase: The field's value will be converted to lower case letters.

Ex: If a field's value is 'Hello!', after Lowercase, it will become 'hello!'

Conversion AddPrefix(prefix): The field's value will be prefixed using the value of 'prefix'.

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Ex: If a field's value is 'Smith', after AddPrefix(Dr.), it will become 'Dr. Smith'

Conversion AddSuffix(suffix): The field's value will be suffixed using the value of 'suffix'

Ex: If a field's value is 'Dr. Smith', after AddSuffix(Jr.), it becomes 'Dr. Smith Jr.'

Conversion Delete(from,count): The 'count' characters will be deleted from the field's value starting from position 'from' where the first character is considered at position 1.

Ex: If a field's value is 'IceCreamEater', after Delete(4,5), it becomes 'IceEater'.

Conversion RemoveRightMost(count):The 'count' characters will be deleted from the right side of the field's value.

Ex: If a field's value is 'Hi there', after RemoveRightMost(6), it becomes 'Hi'

Conversion Insert(position,string): The value of 'string' will be inserted in the field's value before the position indicated by 'position', (the first character is considered at position 1.)

Ex: If a field's name is 'Fruits juice', after Insert(7,& Cream), it becomes 'Fruits & Cream juice'

Conversion Replace(OldValue,NewValue): If the field's value is 'OldValue' it will be replaced by the value of 'NewValue'. If one of the field values contains a comma (,) character, then it needs to be enclosed in brackets ("").

Ex: If the field's value is 'IN', after Replace(IN, Received), it becomes 'Received'

EndField: This specifies the end of a field description.

Constraints:

1 The table section must be specified once for each table.
2 There must be one field description per actual table field.
3 All words (keywords and values) located on the same line must be separated by one space character (ASCII #32).
4 All keywords must start on a new line.
5 If a certain keyword is not applicable then it can be omitted from the description file.
6 Every line can be preceded or followed by empty lines
7 Empty table fields will be given an EDC default value.
8 A record will be skipped if required table fields have empty values.
9 A line that starts with // is a comment and will be ignored
10 A line that starts with { will be followed by a comment that will end on a line that ends with }

Table specific rules:

Box Table

- Possible values for Activity field at the record center: PreAdd, In, Out. If the activity is In, a valid location must be specified. If the value is PreAdd or Out, any location is ignored.

- Possible values for Activity field at the client: PreAdd, Printed (in-house). If the activity is not valid, it will default to PreAdd at both the record center and client sites.

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- Possible values for DestType field: NonConfidential, Permanent, Confidential, Sample, Revision, SendToDepot, None

- Alternate bar code labels may be imported with a field name of 'BarCode'. Both primary and secondary notes may be imported with field names called 'Notes1' and 'Notes2' respectively.

- With the box table import it is possible to update existing records . If a matching box based on CustBoxNo or on BoxDDNo is found, the box will be updated.

- When importing boxes into the IN state, the location in which the boxes will be imported must be a transit location.

- Certain values are obligatory when importing: Activity, MainDeptName, SubDeptName, Volume, CustBoxNo.

File Table

- Possible values for Activity field at the record center: PreAdd, Out

- Possible values for Activity field at the client: PreAdd, Printed (in-house). If the activity is not valid, it will default to actPreAdd at both the record center and client sites.

- Possible values for DestType field: NonConfidential, Permanent, Confidential, Sample, Revision, SendToDepot, None

- Alternate bar code labels may be imported with a field name of 'BarCode'. Both primary and secondary notes may be imported with field names called 'Notes1' and 'Notes2' respectively.

- With the file table import it is not possible to update existing records, as there is no unique key in the file table, ie, it is possible to have duplicate CustFileNo and Description values, if the option "Unique File number" is set to "No" in the Customer Information module.

Import Options

The following options affect which types of operations are allowed by the import, and what messages appear in the import log. They are designed to protect against some of the dangers of importing data rather than

***boxmodifyonly:** Allows existing boxes in the system to be updated, but prevents the addition of new records for boxes that are not recognized.
***filemodifyonly:** Allows existing files in the system to be updated, but prevents the addition of new records for files that are not recognized.
***departementmodifiyonly:** Prevents the addition of new departments.
***donotupdateexistingrecords:** Allows the addition of new records but prevents existing boxes in the system from being modified.
***skipduplicaterecordwarning:** Omits the warning that would otherwise appear in the import error log when a record is affected twice by the same import.
***skiptruncationwarning:** Omits the warning that would otherwise appear in the import error log when the length of a data string exceeds the length available in the field in the system.
***skipfileboxintegrity:** Omits the warning that would otherwise appear in the import error log when a file has different retention than the box containing it.
***skipinvaliddatewarning:** Omits the warning that occurs when imported dates are greater than 3999-12-31.

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***disablestartenddatewarning:** Omits the warning that would otherwise appear in the import error log when the end date for a record is more recent than the start date.
***disablerangewarning:** Omits the warning that would otherwise appear in the import error log when the start of a range is greater than the end of a range.
***allowstatechange:** Allows the import to affect the state of the box, for example between PRE ADD, IN, and OUT.
***RejectOnDuplicateAltLabel:** Causes an attempt to import a record with an alternate label that already exists in the system to reject the update or addition of the new box rather than adding the box (without the alternate label) but including an error message and skipping the assignment of the bar code.
***SkipVaultValidation:** With this option, it is possible to import items for tape-only accounts into non-vault locations.
***ReplaceNotesInsteadOfAppend:** Causes notes fields to be overwritten by the import rather than appending imported notes to the existing notes for the box or file.

10.9.2.1 Examples of description files

*Example of a description file for a box importation (Excel data file): (this example refers to the previously seen excel data file)

```
Version        1

BeginTable

// fields are identified by column number
FieldsIDType    column

// command separated file
FileType        excel
SheetNumber     1
Tablename       Box
DataFileName  U:\data\Import tests for manual\datafile.box.xls
* skiptruncationwarning

DefaultEDCFieldValue CustKey(F-001)
DefaultEDCFieldValue SubDeptName(GEN)
DefaultEDCFieldValue Activity(IN)
DefaultEDCFieldValue Location(VH-9-9999-99)
DefaultEDCFieldValue Volume(1.2)

BeginField
FieldID      2
EDCFieldName CustBoxNo
FieldType    alpha
EndField

BeginField
FieldID      3
EDCFieldName BoxOwner
FieldType    alpha
EndField

BeginField
FieldID      4
EDCFieldName MainDeptName
```

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```
FieldType    alpha
EndField

BeginField
FieldID      5
EDCFieldName Description
FieldType    alpha
EndField

BeginField
FieldID      6
EDCFieldName StartDate
FieldType    date
DateMask         dd/mm/yyyy
Epoch            80
EndField

BeginField
FieldID      7
EDCFieldName DocType
FieldType    alpha
EndField

BeginField
FieldID      8
EDCFieldName DestType
FieldType  number
EndField

BeginField
FieldID      9
EDCFieldName DestDate
FieldType    date
DateMask         dd/mm/yyyy
Epoch            80
EndField

BeginField
FieldID      10
EDCFieldName EntryDate
FieldType    date
DateMask         dd/mm/yyyy
Epoch            80
EndField

BeginField
FieldID      11
EDCFieldName  InVault
FieldType    boolean
EndField

BeginField
FieldID      12
```

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EDCFieldName SourceLoc
FieldType alpha
EndField

BeginField
FieldID 13
EDCFieldName AccessLevel
FieldType number
EndField

BeginField
FieldID 14
EDCFieldName OldCustBoxNo
FieldType alpha
EndField

EndTable

*Example of a description file for a box importation (using Separated FileType):
BeginTable

FileType separated
DataFileName U:\datatestsmanual\datafile.ex2.txt
Separator ,
Delimiter "
FieldsIDType Column
TableName Box

DefaultEDCFieldValue CustKey(DEMO-E)
DefaultEDCFieldValue SubDeptName(GEN)
DefaultEDCFieldValue Activity(IN)
DefaultEDCFieldValue Location(VH-9-9999-99)
DefaultEDCFieldValue Volume(1.2)

BeginField
FieldID 1
EDCFieldName CustBoxNo
FieldType alpha
Conversion AddPrefix(DATA-00)
EndField

BeginField
FieldID 2
EDCFieldName MainDeptName
FieldType alpha
EndField

BeginField
FieldID 3
EDCFieldName DocType
FieldType alpha
EndField

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BeginField
FieldID 4
EDCFieldName Accesslevel
FieldType number
EndField

BeginField
FieldID 5
EDCFieldName InVault
FieldType boolean
EndField

EndTable

*Example of a description file for a box importation (using FixedWidth FileType):
BeginTable

FileType FixedWidth
DataFileName U:\datatestsmanual\datafile4.txt
FieldsIDType Column
TableName Box

DefaultEDCFieldValue CustKey(DEMO-E)
DefaultEDCFieldValue SubDeptName(GEN)
DefaultEDCFieldValue Activity(IN)
DefaultEDCFieldValue Location(VH-9-9999-99)
DefaultEDCFieldValue Volume(1.2)

BeginField
ColumnStart 1
ColumnEnd 7
FieldID 1
EDCFieldName CustBoxNo
FieldType alpha
Conversion AddPrefix(DATA2-00)
EndField

BeginField
ColumnStart 8
ColumnEnd 16
FieldID 2
EDCFieldName MainDeptName
FieldType alpha
EndField

BeginField
ColumnStart 17
ColumnEnd 25
FieldID 3
EDCFieldName DocType
FieldType alpha
EndField

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BeginField
ColumnStart 26
ColumnEnd 32
FieldID 4
EDCFieldName Accesslevel
FieldType number
EndField

BeginField
ColumnStart 33
ColumnEnd 36
FieldID 5
EDCFieldName InVault
FieldType boolean
EndField

EndTable

10.9.2.2 List of EDC Field Names

Here is a list of EDC Field Names in order to be able to do the importation.
The following abbreviations are used for the various types of data:

(A) Alphanumerical field, meaning characters such as letters and numbers.
(N) Numerical
(D) Date. When using this type of field, the DateMask and Epoch must be specified in the description file.
(T) Time. You must specify the T (you must specify the **TimeMask** in the description file
(B) Boolean FieldType (the values must be + or -)

General
Customer key - CustKey

Boxes
TableName: Box

Number - CustBoxNo (A)
Owner - BoxOwner (A)
Department (it is preferable to define or import it in EDC RC prior to this importation) - MainDeptName (A)
Sub department (it is preferable to define or import it in EDC RC prior to this importation) - SubDeptName (A)
Alternate label (this field is only visible when an alternate label is assigned to the item) - BarCode (A)
Description - Description (A). Note that when importing to this field, CrLf, Cr, Lf, and Tab characters are replaced with spaces.
Start Date - StartDate (D)
Type - (it is preferable to define or import it in EDC RC prior to this importation) DocType (A)
Field1- UserField1 (A)
Field3- UserField3 (A)
Disposal : DestType (N) *see the activity codes for destruction types below DestDate (D)
Range : RangeFrom (A) RangeTo (A)
Files – not possible
Entry Date - EntryDate (D)

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Volume – Volume (N)
In vault – InVault (B)
Field4- UserField4 (A)
Field6- UserField6 (B)
State - Activity (A)
Box out to - OutTo (A) This will be used in the box history for boxes that have the Out state at the time of import.
Out Date - OutDate (D) Date that the item went out.
Box RC number – BoxDDNo (**this is only done in order to update the CustBoxNo or other fields - this means that an initial importation has to be performed before.)
End Date – EndDate (D)
Source – SourceLoc (A)
Field2 – UserField2 (A)
Access level - Accesslevel (N)
Old box number – OldCustBoxNo (A)
Withdrawal Date – * one should not include this field in the importation since it is specified when a box is added to a deletion list.
Location - Location (A) (* make sure it respects the location mask 371 predefined in EDC RC)
Field5 – UserField5 (A)
Item set – not possible

Notes1- The information will be imported in the Notes of the box (A)
Notes2 - The information will be imported in the Secondary Notes of the box (A)
BarCode - The information will be imported as the alternate label of the box (A)

Files
TableName: Folder

Customer key – CustKey (A)
Number – CustFileNo (A)
Owner – FileOwner (A)
Department (it is preferable to define or import it in EDC RC prior to this importation) - MainDeptName (A)
Sub department (it is preferable to define or import it in EDC RC prior to this importation) - SubDeptNo (A)
Alternate label (this field is only visible when an alternate label is assigned to the item) - BarCode (A)
Description - Description (A) Note that when importing to this field, CrLf, Cr, Lf, and Tab characters are replaced with spaces.
Start Date - StartDate (D)
Type - (it is preferable to define or import it in EDC RC prior to this importation) DocType (A)
Field1- UserField1(A)
Field3- UserField3 (A)
Disposal - DestType (N)*see the activity codes for destruction types below DestDate (D)
Range - RangeFrom (A) RangeTo (A)

Box – CustBoxNo (A)
-or-
Box Barcode - BoxBarCode (A)
-or-
Box RC# - BoxDDNo (A)

Entry Date – EntryDate (D)

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State – Activity (A)
File out to - OutTo (A) This will be used in the file history for files that have the Out state at the time of import.
Out Date - OutDate (D) Date that the item went out.
File RC number – FileDDNo (**This is only done in order to update the CustFileNo or other fields - this means that an initial importation has to be performed before. The problem is that updating a CustFileNo may create a duplicate file number, so it is very important to verify all the data before importing.)
End Date – EndDate (D)
Source – SourceLoc (A)
Field2 – UserField2 (A)
Access level - Accesslevel (N)
Old number – OldCustFileNo (N)
Withdrawal Date – WithdrawalDate (D)* one should not include this field in the importation since it is specified when a file is added to a deletion list.
Item set – not possible

*Notes1 - The information will be imported in the Notes of the file (A)
Notes2 - The information will be imported in the Secondary Notes of the file (A)
BarCode - The information will be imported as the alternate label of the file (A)

Field 40_1 - Field40No1 (A)
Field 40_2 - Field40No2 (A)
Field 40_3 - Field40No3 (A)
Field 40_4 - Field40No3 (A)
Field 40_5 - Field40No4 (A)

Field 60_1 - Field60No1 (A)
Field 60_2 - Field60No2 (A)
Field 60_3 - Field60No3 (A)
Field 60_4 - Field60No4 (A)
Field 60_5 - Field60No5 (A)

Field 80_1 - Field80No1 (A)
Field 80_2 - Field80No2 (A)
Field 80_3 - Field80No3 (A)
Field 80_4 - Field80No4 (A)
Field 80_5 - Field80No5 (A)

Retention Schedule (Document type)
TableName: Cust Document Type

Type – Code (A)
French description - FrenchDesc (A)
English description – EnglishDesc (A)

Retention
Active – ActiveRet (N)
Semi-active – SemiActiveRet (N)

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Disposal
Active – ActiveDisposal (N)
Semi-active - SemiActiveDisposal (N)

*Activity codes for destruction types

Confidential = 2; { destroy document confidentially }
NonConfidential = 0; { destroy document non-confidentially}
NullDisposition = 6; { the disposition is not determined.}
Permanent = 1; { keep the document permanently }
Revision = 4; { the document must be recalled to the proper authority (ie, a lawyer) before destroying. }
Sample = 3; { take a sample from the document, and destroy the remaining documents in a separate step, either confidentially or not. }
SendToDepot = 5; { send the document to next depot; an active record goes to an off-site record center, a semi-active record goes to a permanent archiving area.}
Active – Active (B)
Restrictions – not possible
Legal Evaluation – LegalEval (A)
Financial Evaluation – FinancialEval (A)

Buildings
TableName: Buildings

Building – BuildingStr (A)
Description – Description (A)
Transit locations – not possible
Multiple transit locations – MultiTransitLocation (B)
Statistic threshold – StatThresholdMins (N)
Address – AddrLine1 (A)
AddrLine2 (A)
City – City (A)
Province – State (A)
Postal code – PostalCode (A)
Country – Country (A)

Name – ContactName (A)
Telephone – ContactPhone (A) ContactExt (A)
Fax – ContactFax ((A)
Associated buildings – not possible

Business type
TableName: Business Type

Code – Code (A)
Description - Description (A)

Customer Information
TableName: Customer

General
Name – Name (A)
Customer key – CustKey (A)

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Accounting key – AccountingKey (A)
System – not possible
Creation Date – CreationDate (D)
Active – Active (B)
Locked – Locked (B)
Salesperson – Salesperson (A)
Delivery types – not possible
Box types– not possible
Ordering notes – OrderNotes(A)

Address
Address – AddrLine1 (A)
AddrLine2 (A)
City - City (A)
Province – State (A)
Postal code – PostalCode (A)
Country – Country (A)
Telephone – Phone (A) Ext (A)
Fax – Fax (A)
Email – Email (A)

Billing
Bill to – BillTo (A)
Email – AccountingEmail (A)
Auto Invoice – AutoInvoice (B)
Net days – InvoiceNetDays (N)
Default Charge Code – DefaultChargeCode (A)
Billing – BillingType (N) (0: Regular, 1: Charge back, 2: Department)
Invoice Start Month – InvoiceStartMonth (N)
Invoices/year – InvoicesPerYear (N)
Min Cost/Month – MinimumCostPerMonth (N)
Separate Rent Invoice – SeparateRentInvoice (B)
Rent Inv. Start Month – RentInvoiceStartMth (N)
Rent Invoice / year - RentInvoicesPerYear (N)
Page brk detailed Inv. – PageBreakDetailedInv (B)
Billing Building – BillingBuilding (A)
Business – BusinessType (A)
Taxable – Taxable (B)
Purchase Order – InvPurchaseOrder
Renewal Date – RenewalDate (D)
Charge Rent – ChargeRentArrears (B)
Rent Calculation – RentCalculation (A)
Rent Credit – NoRentCredit (B)
Bill full month add/del – BillFullMonthNewBox (B)
Courier Billing – CourierBilling (N) (0: Container, 1: Round Trip item, 2: Delivery, 3: Item, 4: By Item type, 5: Item round trip)
Hourly Rate – HourlyRate (N)
Dictionary string not found – not possible
Dictionary string not found – not possible
Invoice format – NotPaperInvoice (B)*
PDFInvoice (B) TIFInvoice (B)

Options

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Delivery Time – DeliveryTime (0: AM, 1:PM, 2: Both)(N)
Pick Up Time – PickUpTime (0: AM, 1:PM, 2: Both) (N)
Retention – RetentionType (1: Document, 0: Department) (N)
Language – Language (0: English, 1: French) (N)
Types by department – TypeBySubDept (B)
Non track warning – NonTrackWarning (B)
Range Mask – RangeMask (A)
Delivery Labels – DeliveryLabels (B)
Force Passwords – ForcePasswords (B)
Type Integrity – TypeIntegrity (B)
Restriction Integrity – RestrictionIntegrity (B)
Department integrity – DeptIntegrity (B)
Disposal date integrity –DispDateIntegrity (B)
Return To – ReturnTo (A)
Location mask – LocationMask (A)
Default Box Volume – DefaultBoxVolume (N)
Replication – Replication (B)
Volume equivalence box – VEBoxSize1 (N)
= Location – VELocationSize1 (N)
Auto Inventory File – AutoInventoryFile (B)
Order Pre Add Files – OrderPreAddFiles (B)
File To Box Conversion – FileToBoxConversion (B)
File out cards – SuppressFileOutCards (B)
Open Shelf Out Cards - OpenShelfOutCards (B)
File to search conversion – FileToSrchConversion (B)
Sealed Box- SealedBox (B)
Limit to one building – LimitToBuilding (B)
Building – Building (A)
Has Split – not possible
Unique File Number – UniqueCustFileNo (B)
Time with by date order – TimeWithByDateOrder (B)
Order Grouping – NoOrderGrouping (B)
Tape Number Change – TapeNumberChange (B)
Immediate Delivery – ImmediateDelivery (B)
Default box number length – BoxNumberWidth (N)
Automatic box number – AutoBoxNumber (B)
Default file number length – FileNumberWidth (N)
Automatic file number – AutoFileNumber (B)
File in box tracking – NoFileInBoxTracking (B)*
Use ID Cards – IDCardUsage (B)
PDT Number Change – PDTNumberChange (B)
Delivery with PDT – DeliveryWithPDT (B)
Verify Items Not Found – VerifyItemsNotFound (B)
Truck Validation – TruckValidation (B)
EDC Web Department Filtering – WebDeptFiltering (B)
Full Text Search – FullTextSearch (B)
Use Expected Return Dates – ExpectedReturnDates (B)
Recycle after destruction – ReuseBoxesAfterDest (B)

Accession
Department – not possible
Document type – not possible

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Pick up
Morning picking time – MorningPickingTime (must be written hh/mm - ex: 09:00) (T)
Afternoon Picking Time – AfternoonPickingTime (must be written hh/mm - ex: 14:00) (T)

Bill –
ContactName0 (A)
ContactPhone0 (A)
ContactExt0 (A)
ContactFax0 (A)

Purchase –
ContactName1 (A)
ContactPhone1 (A)
ContactExt1 (A)
ContactFax1 (A)

Contract–
ContactName2 (A)
ContactPhone2 (A)
ContactExt2 (A)
ContactFax2 (A)

Other–
ContactName3 (A)
ContactPhone3 (A)
ContactExt3 (A)
ContactFax3 (A)

Invoices
Print Detailed Invoice – PrintDetailedInvoice (B)
Print Delivery Summary – PrintDeliverySummary (B)
Print Out Boxes – PrintOutBoxes (B)
Print Activity Report – PrintActivityReport (B)

Fast Orders
Recipient – FastOrderRecipient (A)
Delivery type – not possible
Delivery address – not possible

Schedule
Override default schedule – ScheduleOverride (B)
Deliver during record center holidays – not possible

Sunday –
OpenW_Sunday (B)
WStartTime_Sunday(T)
WEndTime_Sunday(T)

Monday –
OpenW_Monday (B)
WStartTime_Monday (T)
WEndTime_Monday(T)

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Tuesday –
OpenW_Tuesday (B)
WStartTime_Tuesday (T)
WEndTime_Tuesday(T)

Wednesday –
OpenW_Wednesday (B)
WStartTime_Wednesday (T)
WEndTime_Wednesday(T)

Thursday –
OpenW_Thursday (B)
WStartTime_Thursday (T)
WEndTime_Thursday(T)

Friday –
OpenW_Friday (B)
WStartTime_Friday (T)
WEndTime_Friday(T)

Saturday –
OpenW_Saturday (B)
WStartTime_Saturday (T)
WEndTime_Saturday(T)

** All the start and end times must be written hh/mm - ex: 09:00 or 17:00

Location

Since the auto creation of locations does not allow us to specify all the settings (ex: holding locations). The import is an alternate way of performing a batch creation of locations.

TableName: Space

*Location - Location (A)
Alternate Label - AlternateLabel (A)
Total Size - not possible
*Unit Size - UnitSize (N)
All Sizes - AcceptAllSizes (B)
*Capacity - Capacity (N)
Vault - Vault (B)
Holding - Holding (B)
Tape - Tape (B)
Customer / All - not possible
Department - not possible
Price code - PriceCode (A)
Used - Used (N)
In - InUnits (N)
Out - OutUnits (N)

General pricing

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TableName: Price

UnitType (A) (Each/Minutes,CubicFeet,MegaBytes,LinearFeet,Delivery)
TaxCalculation (A) (TaxAOnly, TaxAPlusTaxB, TaxBOnTaxA, NotTaxable, TaxBOnly)
PriceCode (A)
FrenchDesc (A)
EnglishDesc (A)
Rate (N)
ItemGroup (A) (Rent, Labour, Courier, InventoryList, Imaging, OpenShelf, Misc)

Customer pricing

TableName: Customer Price

UnitType (A) (Each/Minutes/CubicFeet/MegaBytes/LinearFeet/Delivery)
TaxCalculation (A) (TaxAOnly, TaxAPlusTaxB, TaxBOnTaxA, NotTaxable, TaxBOnly)
CustKey (A)
PriceCode (A)
Rate (N)

10.9.3 Other examples of data and description files

These are a few examples of data and description files, take note that all the fields are not necessarily included in the examples.

Excel data file for the File importation:

100	Jean-Marc Girard	ACC	GEN	FILE 1	13/07/2004	BIL	2001	0	13/07/2006	1	9	11	13/07/2004		23 Laurier	3	AA	13/07/2006
101	Jean-Marc Girard	ACC	GEN	FILE 2	13/07/2004	BIL	2002	0	13/07/2006	10	19	11	13/07/2004		23 Laurier	3	AB	13/07/2006
102	John Mayer	MAN	GEN	FILE 3	13/07/2004	PF	2001	2	13/07/2006	1	9	22	13/07/2004		23 Laurier	9	AC	13/07/2006
103	John Mayer	MAN	GEN	FILE 4	13/07/2004	PF	2002	2	13/07/2006	10	19	22	13/07/2004		23 Laurier	9	AD	13/07/2006
104	John Mayer	MAN	GEN	FILE 5	13/07/2004	PF	2003	2	13/07/2006	20	29	22	13/07/2004		23 Laurier	9	AE	13/07/2006
105	John Mayer	MAN	GEN	FILE 6	13/07/2004	PF	2004	2	13/07/2006	30	39	22	13/07/2004		23 Laurier	9	AF	13/07/2006
106	John Mayer	MAN	GEN	FILE 7	13/07/2004	PF	2005	2	13/07/2006	40	49	22	13/07/2004		23 Laurier	9	AG	13/07/2006
107	John Lincoln	WEB	GEN	FILE 8	13/07/2004	MULTI	2001	4	13/07/2006	50	59	33	13/07/2004		23 Laurier	4	AH	13/07/2006
108	John Lincoln	WEB	GEN	FILE 9	13/07/2004	MULTI	2002	4	13/07/2006	60	69	33	13/07/2004		23 Laurier	4	AI	13/07/2006
109	John Lincoln	WEB	GEN	FILE 10	13/07/2004	MULTI	2003	4	13/07/2006	70	79	33	13/07/2004		23 Laurier	4	AJ	13/07/2006
110	John Lincoln	WEB	GEN	FILE 11	13/07/2004	MULTI	2004	4	13/07/2006	80	89	33	13/07/2004		23 Laurier	4	AK	13/07/2006

Description file for the File importation:
BeginTable

// fields are identified by the column number
FieldsIDType column

FileType excel
SheetNumber 1
TableName File
DataFileName U:\data\Import tests for manual\datafile.files.xls

DefaultEDCFieldValue CustKey(F-001)
DefaultEDCFieldValue SubDeptName(GEN)
DefaultEDCFieldValue Activity(PreAdd)

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```
BeginField
FieldID      1
EDCFieldName  CustFileNo
FieldType    alpha
EndField

BeginField
FieldID      2
EDCFieldName  FileOwner
FieldType    alpha
EndField

BeginField
FieldID      3
EDCFieldName MainDeptName
FieldType    alpha
EndField

FieldID      5
EDCFieldName Description
FieldType    alpha
EndField

FieldID      6
EDCFieldName  StartDate
FieldType    date
DateMask         dd/mm/yyyy
Epoch  80
EndField

BeginField
FieldID      7
EDCFieldName  DocType
FieldType    alpha
EndField

FieldID      8
EDCFieldName UserField1
FieldType    alpha
EndField

BeginField
FieldID      9
EDCFieldName DestType
FieldType    number
EndField

BeginField
FieldID      10
EDCFieldName DestDate
FieldType    date
DateMask         dd/mm/yyyy
```

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```
Epoch 80
EndField

BeginField
FieldID 11
EDCFieldName RangeFrom
FieldType alpha
EndField

BeginField
FieldID 12
EDCFieldName RangeTo
FieldType alpha
EndField

FieldID 13
EDCFieldName CustBoxNo
FieldType alpha
EndField

BeginField
FieldID 14
EDCFieldName EntryDate
FieldType date
DateMask dd/mm/yyyy
Epoch 80
EndField

BeginField
FieldID 16
EDCFieldName SourceLoc
FieldType alpha
EndField

BeginField
FieldID 17
EDCFieldName Accesslevel
FieldType number
EndField

BeginField
FieldID 18
EDCFieldName OldCustFileNo
FieldType alpha
EndField

EndField
```

EndTable

Excel data file for the Retention schedule (document type) importation:

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TA	TAPE	12	12	4	5			+
BIL	BILLS	24	12	6	1	BIL	BIL	-
CA	CARDS	5	6	3	3			-
FLY	FLYERS	5	6	2	4			-
DOC	DOCUMENTS	24	12	0	2	DOC	DOCU	-

Description file for the Retention schedule (document type)importation:
BeginTable

FileType excel
SheetNumber 1
DataFileName U:\data\datafile.ret.sc.xls
FieldsIDType Column
TableName Cust Document Type
DefaultEDCFieldValue CustKey(DEMO-A)

BeginField
FieldID 1
EDCFieldName Code
FieldType alpha
EndField

BeginField
FieldID 2
EDCFieldName EnglishDesc
FieldType alpha
EndField

BeginField
FieldID 3
EDCFieldName ActiveRet
FieldType number
EndField

BeginField
FieldID 4
EDCFieldName SemiActiveRet
FieldType number
EndField

BeginField
FieldID 5
EDCFieldName ActiveDisposal
FieldType number
EndField

BeginField
FieldID 6
EDCFieldName SemiActiveDisposal
FieldType number
EndField

BeginField
FieldID 9

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EDCFieldName Active
FieldType Boolean
EndField

BeginField
FieldID 7
EDCFieldName LegalEval
FieldType alpha
EndField

BeginField
FieldID 8
EDCFieldName FinancialEval
FieldType alpha
EndField

EndTable

Excel data file for the Business type importation:

CL	CLAIMS
MAR	MARINES
BO	BOAT
COMP	COMPUTER
TV	TELEVISION

Description file for the Business type importation:
BeginTable

FileType excel
SheetNumber 1
DataFileName U:\data\Import tests for manual\datafile.bus.type.xls
FieldsIDType Column
TableName Business Type

BeginField
FieldID 1
EDCFieldName Code
FieldType alpha
EndField

BeginField
FieldID 2
EDCFieldName Description
FieldType alpha
EndField

EndTable

Excel data file for the Building importation:

LA	Lasalle	+	5	1 haut de la chute	montreal	qc	J9P 4R7	Canada	Doctechno	514-123-4567	514-432-4567
VH	Van Horne	-	10	2 des jésuites	quebec	qc	J8P 4w7	Canada	Docufile	514-451-4437	514-442-4437

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Description file for the Building importation:
BeginTable

FileType excel
SheetNumber 1
DataFileName U:\data\Import tests for manual\datafile.building.xls
FieldsIDType Column
TableName Buildings

BeginField
FieldID 1
EDCFieldName BuildingStr
FieldType alpha
EndField

BeginField
FieldID 2
EDCFieldName Description
FieldType alpha
EndField

BeginField
FieldID 3
EDCFieldName MultiTransitLocation
FieldType boolean
EndField

BeginField
FieldID 4
EDCFieldName StatThresholdMins
FieldType number
EndField

BeginField
FieldID 5
EDCFieldName AddrLine1
FieldType alpha
EndField

BeginField
FieldID 6
EDCFieldName City
FieldType alpha
EndField

BeginField
FieldID 7
EDCFieldName State
FieldType alpha
EndField

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BeginField
FieldID 8
EDCFieldName PostalCode
FieldType alpha
EndField

BeginField
FieldID 9
EDCFieldName Country
FieldType alpha
EndField

BeginField
FieldID 10
EDCFieldName ContactName
FieldType alpha
EndField

BeginField
FieldID 11
EDCFieldName ContactPhone
FieldType alpha
EndField

BeginField
FieldID 12
EDCFieldName ContactFax
FieldType alpha
EndField

EndTable

Data file for the Customer importation (In the Customer Information module):
"Docu p","P-001","201","12/07/2004","+","-","Roger Smith","23 Laurier","Quebec","QC","I0P 6Y8","Canada","418-305-0098","418-405-0098","Docuf@netsoft.ca","Demo F","Docuf@netsoft.ca","+","30","Regular","1","12","30","+","1","1","+","VH","HOS","-","12/07/2005","-","Daily","-","+","Container","10","-","-","2","2","1","Box","1","+","-","+","-","+","+","-","+","1.2","+","-","+","-","+","+","-","+","VH","+","-","+","-","+","+","5","+","6","-","+","-","+","-","+","+","+","-","+","11:00","14:00","Donald Rippley","418-324-0021","221","418-324-0022","Donald Rippley","418-324-0021","221","418-324-0022","+","+","+","+","Roger Smith","REGULAR","23 Laurier","+","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","-","-"

"Docu o","O-001","202","12/07/2004","+","-","John Keith","13 St-Laurent","Montreal","QC","K5P 6H5","Canada","514-978-7743","514-578-7743","Docug@netsoft.ca","Demo G","Docug@netsoft.ca","+","30","Department","7","6","150","-","7","0","+","CL","PUB","+","12/07/2005","+","Monthly","+","-","Delivery","12","+","+","2","2","0","Tape","0","-","+","-","+","-","-","+","-","0.1","-","+","-","+","-","-","+","-","RU","-","+","-","+","-","-","5","-","6","+","-","+","-","+","-","-","-","+","-","11:00","14:00","Mark Sawyer","514-872-0047","0","514-872-0045","Mark Sawyer","514-872-0047","0","514-872-0045","-","-","-","-","John Keith","0","13 St-Laurent","-","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","+","09:00","17:00","-","-"

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Note: All the data is supposed to be on the same line in the file since the importation works by separation, but because of the book's format we had to show it this way.

Description file for the Customer importation:
BeginTable

```
FileType       separated
DataFileName   U:\data\Import tests for manual\datafile.custinfo7.txt
FieldsIDType     Column
Separator          ,
Delimiter          "
TableName     Customer


BeginField
FieldID      1
EDCFieldName Name
FieldType    alpha
EndField

BeginField
FieldID      2
EDCFieldName CustKey
FieldType    alpha
EndField

BeginField
FieldID      4
EDCFieldName CreationDate
FieldType    Date
DateMask     dd/mm/yyyy
Epoch  80
EndField

BeginField
FieldID      5
EDCFieldName Active
FieldType    boolean
EndField

BeginField
FieldID      6
EDCFieldName Locked
FieldType    boolean
EndField

BeginField
FieldID      7
EDCFieldName Salesperson
FieldType    alpha
EndField

BeginField
```

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```
FieldID      8
EDCFieldName AddrLine1
FieldType    alpha
EndField

BeginField
FieldID      9
EDCFieldName City
FieldType    alpha
EndField

BeginField
FieldID      10
EDCFieldName State
FieldType    alpha
EndField

BeginField
FieldID      11
EDCFieldName PostalCode
FieldType    alpha
EndField

BeginField
FieldID      12
EDCFieldName Country
FieldType    alpha
EndField

BeginField
FieldID      13
EDCFieldName Phone
FieldType    alpha
EndField

BeginField
FieldID      14
EDCFieldName Fax
FieldType    alpha
EndField

BeginField
FieldID      15
EDCFieldName Email
FieldType    alpha
EndField

BeginField
FieldID      16
EDCFieldName BillTo
FieldType    alpha
EndField
```

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```
BeginField
FieldID     17
EDCFieldName AccountingEmail
FieldType    alpha
EndField

BeginField
FieldID     18
EDCFieldName AutoInvoice
FieldType    boolean
EndField

BeginField
FieldID     19
EDCFieldName  InvoiceNetDays
FieldType    number
EndField

BeginField
FieldID     20
EDCFieldName BillingType
FieldType    alpha
EndField

BeginField
FieldID     21
EDCFieldName InvoiceStartMonth
FieldType    number
EndField

BeginField
FieldID     22
EDCFieldName InvoicesPerYear
FieldType    number
EndField

BeginField
FieldID     23
EDCFieldName MinimumCostPerMonth
FieldType    number
EndField

BeginField
FieldID     24
EDCFieldName SeparateRentInvoice
FieldType    boolean
EndField

BeginField
FieldID     25
EDCFieldName RentInvoiceStartMth
FieldType    number
EndField
```

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```
BeginField
FieldID      26
EDCFieldName RentInvoicesPerYear
FieldType    number
EndField

BeginField
FieldID      27
EDCFieldName PageBreakDetailedInv
FieldType    boolean
EndField

BeginField
FieldID      28
EDCFieldName BillingBuilding
FieldType    alpha
EndField

BeginField
FieldID      29
EDCFieldName BusinessType
FieldType    alpha
EndField

BeginField
FieldID      30
EDCFieldName Taxable
FieldType    boolean
EndField

BeginField
FieldID      31
EDCFieldName RenewalDate
FieldType    date
DateMask     dd/mm/yyyy
Epoch  80
EndField

BeginField
FieldID      32
EDCFieldName ChargeRentArrears
FieldType    boolean
EndField

BeginField
FieldID      33
EDCFieldName RentCalculation
FieldType    alpha
EndField

BeginField
FieldID      34
```

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```
EDCFieldName NoRentCredit
FieldType    boolean
EndField

BeginField
FieldID      35
EDCFieldName BillFullMonthNewBox
FieldType    boolean
EndField

BeginField
FieldID      37
EDCFieldName HourlyRate
FieldType    number
EndField

BeginField
FieldID      38
EDCFieldName NotPaperInvoice
FieldType    boolean
EndField

BeginField
FieldID      39
EDCFieldName PDFInvoice
FieldType    boolean
EndField

BeginField
FieldID      40
EDCFieldName DeliveryTime
FieldType    number
EndField

BeginField
FieldID      41
EDCFieldName PickUpTime
FieldType    number
EndField

BeginField
FieldID      42
EDCFieldName RetentionType
FieldType    number
EndField

BeginField
FieldID      43
EDCFieldName  ContainerType
FieldType    alpha
EndField
```

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```
BeginField
FieldID     44
EDCFieldName Language
FieldType    number
EndField

BeginField
FieldID     45
EDCFieldName TypeBySubDept
FieldType    boolean
EndField

BeginField
FieldID     46
EDCFieldName NonTrackWarning
FieldType     boolean
EndField

BeginField
FieldID     47
EDCFieldName DeliveryLabels
FieldType     boolean
EndField

BeginField
FieldID     48
EDCFieldName ForcePasswords
FieldType     boolean
EndField


BeginField
FieldID     49
EDCFieldName TypeIntegrity
FieldType    boolean
EndField

BeginField
FieldID     50
EDCFieldName RestrictionIntegrity
FieldType     boolean
EndField

BeginField
FieldID     51
EDCFieldName DeptIntegrity
FieldType     boolean
EndField

BeginField
FieldID     52
EDCFieldName DispDateIntegrity
FieldType     boolean
```

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```
EndField

BeginField
FieldID     53
EDCFieldName DefaultBoxVolume
FieldType    number
EndField


BeginField
FieldID     54
EDCFieldName Replication
FieldType    boolean
EndField

BeginField
FieldID     55
EDCFieldName AutoInventoryFile
FieldType     boolean
EndField

BeginField
FieldID     56
EDCFieldName OrderPreAddFiles
FieldType     boolean
EndField

BeginField
FieldID     57
EDCFieldName FileToBoxConversion
FieldType     boolean
EndField


BeginField
FieldID     58
EDCFieldName SuppressFileOutCards
FieldType    boolean
EndField

BeginField
FieldID     59
EDCFieldName OpenShelfOutCards
FieldType     boolean
EndField

BeginField
FieldID     60
EDCFieldName FileToSrchConversion
FieldType     boolean
EndField

BeginField
```

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```
FieldID      61
EDCFieldName SealedBox
FieldType    boolean
EndField

BeginField
FieldID      62
EDCFieldName Building
FieldType    alpha
EndField

BeginField
FieldID      64
EDCFieldName UniqueCustFileNo
FieldType    boolean
EndField

BeginField
FieldID      65
EDCFieldName TimeWithByDateOrder
FieldType    boolean
EndField

BeginField
FieldID      66
EDCFieldName NoOrderGrouping
FieldType    boolean
EndField

BeginField
FieldID      67
EDCFieldName TapeNumberChange
FieldType    boolean
EndField

BeginField
FieldID      68
EDCFieldName ImmediateDelivery
FieldType    boolean
EndField

BeginField
FieldID      69
EDCFieldName BoxNumberWidth
FieldType    number
EndField

BeginField
FieldID      70
EDCFieldName AutoBoxNumber
FieldType    boolean
EndField
```

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BeginField
FieldID 71
EDCFieldName FileNumberWidth
FieldType number
EndField

BeginField
FieldID 72
EDCFieldName AutoFileNumber
FieldType boolean
EndField

FieldID 73
EDCFieldName NoFileInBoxTracking
FieldType boolean
EndField

BeginField
FieldID 74
EDCFieldName IDCardUsage
FieldType boolean
EndField

BeginField
FieldID 75
EDCFieldName DeliveryWithPDT
FieldType boolean
EndField

BeginField
FieldID 76
EDCFieldName VerifyItemsNotFound
FieldType boolean
EndField

BeginField
FieldID 77
EDCFieldName TruckValidation
FieldType boolean
EndField

BeginField
FieldID 78
EDCFieldName WebDeptFiltering
FieldType boolean
EndField

BeginField
FieldID 79
EDCFieldName FullTextSearch
FieldType boolean

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```
EndField

BeginField
FieldID     80
EDCFieldName ExpectedReturnDates
FieldType     boolean
EndField

BeginField
FieldID     81
EDCFieldName ReuseBoxesAfterDest
FieldType     boolean
EndField

BeginField
FieldID     82
EDCFieldName MorningPickingTime
FieldType     time
TimeMask      hh/mm
EndField

BeginField
FieldID     83
EDCFieldName AfternoonPickingTime
FieldType     time
TimeMask      hh/mm
EndField

BeginField
FieldID     84
EDCFieldName ContactName0
FieldType     alpha
EndField

BeginField
FieldID     85
EDCFieldName ContactPhone0
FieldType     alpha
EndField


BeginField
FieldID     86
EDCFieldName ContactExt0
FieldType    alpha
EndField

BeginField
FieldID     87
EDCFieldName ContactFax0
FieldType     alpha
EndField
```

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```
BeginField
FieldID     88
EDCFieldName ContactName1
FieldType     alpha
EndField

BeginField
FieldID     89
EDCFieldName ContactPhone1
FieldType     alpha
EndField

BeginField
FieldID     90
EDCFieldName ContactExt1
FieldType     alpha
EndField

BeginField
FieldID     91
EDCFieldName ContactFax1
FieldType     alpha
EndField

BeginField
FieldID     92
EDCFieldName PrintDetailedInvoice
FieldType     boolean
EndField

BeginField
FieldID     93
EDCFieldName PrintDeliverySummary
FieldType     boolean
EndField


BeginField
FieldID     94
EDCFieldName PrintOutBoxes
FieldType     boolean
EndField

BeginField
FieldID     95
EDCFieldName PrintActivityReport
FieldType     boolean
EndField

BeginField
FieldID     96
EDCFieldName FastOrderRecipient
FieldType     alpha
```

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```
EndField

BeginField
FieldID      99
EDCFieldName ScheduleOverride
FieldType    boolean
EndField

BeginField
FieldID      100
EDCFieldName OpenW_Monday
FieldType    boolean
EndField

BeginField
FieldID      101
EDCFieldName WStartTime_Monday
FieldType    Time
TimeMask     hh/mm
EndField

BeginField
FieldID      102
EDCFieldName WEndTime_Monday
FieldType    Time
TimeMask     hh/mm
EndField

BeginField
FieldID      103
EDCFieldName OpenW_Tuesday
FieldType    boolean
EndField

BeginField
FieldID      104
EDCFieldName WStartTime_Tuesday
FieldType    Time
TimeMask     hh/mm
EndField

BeginField
FieldID      105
EDCFieldName WEndTime_Tuesday
FieldType    Time
TimeMask     hh/mm
EndField

BeginField
FieldID      106
EDCFieldName OpenW_Wednesday
FieldType    boolean
EndField
```

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```
BeginField
FieldID     107
EDCFieldName WStartTime_Wednesday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID     108
EDCFieldName WEndTime_Wednesday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID     109
EDCFieldName OpenW_Thursday
FieldType     boolean
EndField

BeginField
FieldID     110
EDCFieldName WStartTime_Thursday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID     111
EDCFieldName WEndTime_Thursday
FieldType     Time
TimeMask       hh/mm
EndField

BeginField
FieldID     112
EDCFieldName OpenW_Friday
FieldType     boolean
EndField

BeginField
FieldID     113
EDCFieldName WStartTime_Friday
FieldType     Time
TimeMask      hh/mm
EndField

BeginField
FieldID     114
EDCFieldName WEndTime_Friday
FieldType     Time
TimeMask      hh/mm
```

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```
EndField

BeginField
FieldID      115
EDCFieldName OpenW_Saturday
FieldType    boolean
EndField

BeginField
FieldID      116
EDCFieldName OpenW_Sunday
FieldType    boolean
EndField
```

EndTable

10.9.4 Importing in_house items and locations

Record centers are able to quickly find items because EDC tracks the location of each time. Items that are stored at the record center are considered semi-active. Active items are those which have not yet been sent to the record center. DocuData provides both ActiveFile and the Active File module of ActiveWeb as tools to help your customers to manage these boxes and files. To distinguish them from items managed at the record center, the status of active items includes the word "InHouse" (e.g. Printed_InHouse, In_InHouse, Out_InHouse, Destroyed_InHouse)

The following example shows a description file and some test data for importing in_house locations. This would be done when setting up a customer to use the circulation tab of ActiveWeb to manage their in_house files, which might or might not eventually get sent to the record center.

The boxes and files themselves may be imported in the usual manner, using an import through EDC RC with a description file 430, using the data import wizard 432, or using ActiveWeb 127, with one of the following activities specified through a column in the spreadsheet:

```
In_InHouse
Out_InHouse
Destroyed_InHouse
```

It is necessary to specify a location for times that are In_InHouse or Out_InHouse. If the location provided is not recognized, it will be created during the import.

Sample InHouse location import description file

```
BeginTable

FieldsIDType   column
FileType separated
Separator    ,
Delimiter     "
TableName     Customer Space
DataFileName   c:\dev\work1\importtests\CustSpaceData.txt
DefaultEDCFieldValue CustKey(001)


BeginField
```

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```
FieldID     1
EDCFieldName Location
FieldType    alpha
EndField

BeginField
FieldID     2
EDCFieldName Full
FieldType    Boolean
EndField

BeginField
FieldID     3
EDCFieldName LocationType
FieldType    alpha
EndField

BeginField
FieldID     4
EDCFieldName Capacity
FieldType    number
EndField

BeginField
FieldID     5
EDCFieldName Used
FieldType    number
EndField

BeginField
FieldID     6
EDCFieldName OutCount
FieldType    number
EndField

EndTable
```

Sample InHouse location data

```
B5000,+,box,100,5,1
B5001,+,box,100,0,0
B5002,+,box,0,0,0
F5000,-,file,200,1,3
F5001,-,file,200,2,2
F5001,-,file,300,3,1
```

10.10 List of related applications

This is a list of applications used with EDC to perform specific tasks.

CLIENT INSTALLER : The Client Installer is a distributed installation program which installs the EDC ActiveFile software for the client of a record center. In summary, the Client Installer performs the following actions: installs the EDC ActiveFile software, obtains the client's data from its record center and obtains trial license from DocuData.

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DCLOCK32.EXE : This application is normally used when one needs to unlock locked sessions. A session is usually locked by the system when a computer crashes during an operation and the number of users has been exceeded when a new session is opened. Specific users (either at the record center or at a client's site) can have access to this program; to set up these users go in the Customer (for a client) or Management (for an employee) section -> User Group | Employee Group or Authorized user | Employee -> Edit -> Edit, add the "Access Management" module to their list of accessible modules.

Note: Often the session is not entirely locked, only one module cannot be accessed. In this case, one can unlock operations in the System Information module (see View and unlock locked operations 384).

DCSETP32.EXE: This application is used to run the DC.CFG file (this is the configuration file that points out the starting directories of EDC RC or EDC ActiveFile).

DIMP32.EXE : This application is used when one needs to update the dictionary used by EDC (this is specifically for the fields and the menus of the software). The data of the dictionary is stored in String.dat (in the data directory).

DOCU32.EXE: This is the main application that starts EDC RC.

EDCCLRPC.EXE: This is a server program used by EDC ActiveFile Web software.

EDCMONITOR.EXE: This application monitors the dispatcher program. It verifies if new changes were done in EDC and sends them to another program (specific to one of our clients).

EDCREP32.EXE : This application is used for the replication of data. It controls the start and end time of the different replication processes.

EDCREQIP.EXE : Only used on with EDC ActiveFile, this program is responsible for communicating and encrypting the data received. The program EDCREP32.EXE needs this program to do the replication between the RC and the customer.

EDCRPC.EXE : This application allows EDC programs as well as other programs to communicate with EDC.

EDCSER32.EXE : This application allows modem replication with the client server (this application is only useful when a modem is used).

EDCSERIP.EXE : This application communicates by IP over the network to send and receive files from a client server (this application is responsible for the replication with the client).

EDCSHL32.EXE : This application launches other EDC programs. Usually the launcher runs the following programs: IMGSER32.EXE, EDCREP32.EXE, EDCREQIP.EXE.

IMGSER32.EXE: This application is an image server, that is used for digital imaging.

LICENS32.EXE: This program allows installing the license for the software. Works with both RC and Client version. For example, if the client wants to increase their number of users, or move from the SA to SAI version of the software, the license we give them will be entered in this program.

ORDCHECK.EXE : This application is responsible of informing you when the Order Monitor (ORDMON32.EXE**)** is not working.

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ORDMON32.EXE : This application monitors incoming orders and notifies the record center's personnel when rush orders are entered.

RCKEYGEN.EXE: Program that must be executed only once at each record center. It will create random encryption
keys to allow secure replication between the record center and its clients.

REMO32.EXE: This is the main application that starts EDC ActiveFile.

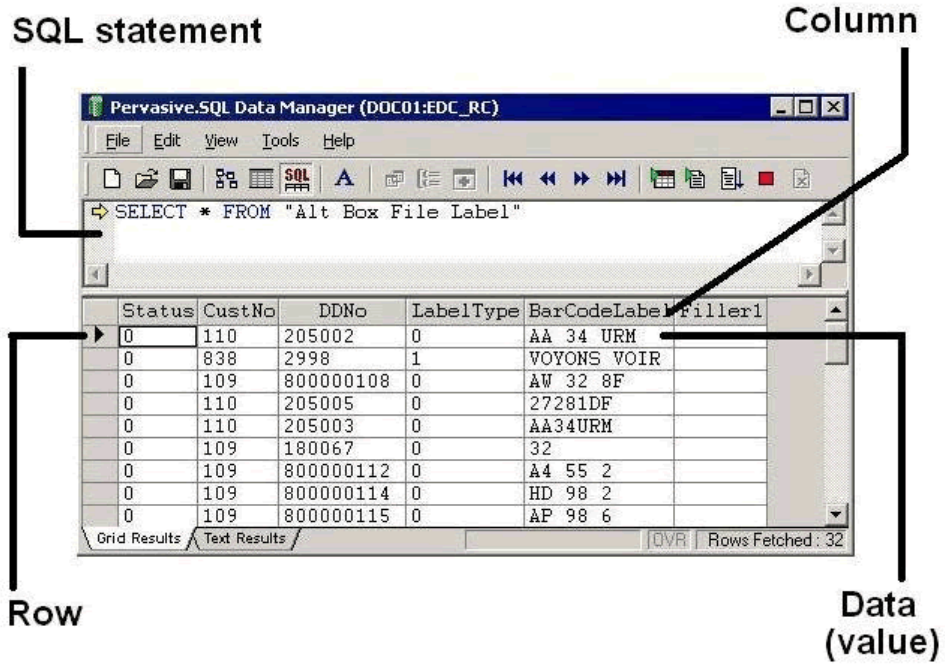
THERMALPRINTSERVER.EXE: Program that allows configuring in DcSetp32.EXE a thermal printer that is installed on a specific machine identified by an IP address.

UPDATE.EXE: This application is used when updating the software.

10.11 Tables

This topic deals with the major tables used by EDC. This will be useful especially if you start working with more advanced reports.

Definition
A table is the basic unit of storage in a database management system. It represents entities and relationships, and consists of one or more units of information (rows), each of which contains the same kinds of values (columns). Each column is given a column name, a data type, and a width. The values found in the tables are the values found in the software.


SQL statement
Column
Pervasive.SQL Data Manager (DOC01:EDC_RC)
File Edit View Tools Help
SELECT * FROM "Alt Box File Label"
Status CustNo DDNo LabelType BarCodeLabel Filler1
0 110 205002 0 AA 34 URM
0 838 2998 1 VOYONS VOIR
0 109 800000108 0 AW 32 8F
0 110 205005 0 27281DF
0 110 205003 0 AA34URM
0 109 180067 0 32
0 109 800000112 0 A4 55 2
0 109 800000114 0 HD 98 2
0 109 800000115 0 AP 98 6
Grid Results Text Results
OVR Rows Fetched : 32
Row
Data
(value)

Description
Access_Error
Module: Authorized user, Employee
Description: This table logs the time, date, customer, and authorized user for unsuccessful logon

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attempts (incorrect passwords). If the number of unsuccessful logon attempts exceeds 10 within a 10 minute period, the user or employee's profile is made inactive until reset.
Important Fields:
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field. The value of this field is 0 if the access error is by an employee.
UserNo - EDC generated customer number, which can be see in the Authorized User module under the

Access_Log
Module: Access Log
Description: This table keeps track of all the sessions opened in EDC (user, date and time, etc.)
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
Site - Number given to a specific building
SessionNo - Automatic number given to each session opened in EDC
UserNo - EDC generated customer number, which can be see in the Authorized User module under the System field.
Active - Boolean FieldType (the values must be + or -) indicating if the session is active
StartDate - Date the session started
StartTime - Time the session started
EndDate - Date the session ended
EndTime - Time the session ended

Alt_Box_File_Label
Module: Box or File
Description: This table stores the alternate labels (bar codes) of boxes and files. Alternate labels can be viewed or modified in the Box or File modules by clicking on **View|Edit -> Alternate label**.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the box or file
LabelType - Box (0) and File (1)
BarCodeLabel - Alternate label

Alt_Space_Label
Module: Location
Description: This table stores the alternate labels (bar codes) of locations. Alternate labels can be viewed or modified in the Location module, in the Alternate label field.
Important Fields:

OldLocation - EDC generated location number
Location - Alternate location label

Box
Module: Box
Description: This table stores most of the information contained in the Box module.
Important Fields:

AccessLevel - Access level of the box
Activity - See the Activity Codes[773] topics
BoxDDNo - RC number of the box

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BoxOwner - Owner of the box
CustBoxNo - Box number
Description - Description
DestDate - Destruction date
DestType - Destruction type (see the Activity Codes 775 topic)
DocTypeNo - Document type number given by the system
EndDate - End date
InVault - Boolean FieldType (the values must be + or -) specifying if the box is in the vault
Location - Box location
MainDeptNo - Department number given by the system
OldCustBoxNo - Old box number
RangeFrom - Range from field
RangeTo - Range to field
SourceLoc - Source location field
StartDate - Start Date
SubDeptNo - Sub-department number given by the system
UserField1 - Field 1
UserField2 - Field 2
UserField3 - Field 3
UserField4 - Field 4
UserField5 - Field 5
UserField6 - Field 6
WithdrawalDate - Withdrawal date

Box_History
Module: Box
Description: This table stores all the information viewable in the Box module, when pressing on **F3** or when clicking on **View -> History**.
Important Fields:

Activity - See the Activity codes 773 topic.
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the box
HxDate - Date of the modification
HxTime - Time of the modification
Person - Name of the person that performed the modification or description of the modification.

Box_Internal _Memo
Module: Internal Note
Description: This table stores the information contained in the Internal Note module, when clicking on **File -> Internal Notes -> Box**.
Important Fields:

ForeignID - In this case, this field corresponds to the BoxDDNo (RC number of the box)
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Box_Memo
Module: Box
Description: This table stores the information viewable in the Box module, when pressing on **F4** or when

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clicking on **View -> Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the BoxDDNo (RC number of the box)
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Box_Memo_2
Module: Box
Description: This table stores the information viewable in the Box module, when clicking on **View -> Secondary Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the BoxDDNo (RC number of the box)
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Box_Return_Date
Module: Orders and Box
Description: This table stores the information that is entered when specifying a return date when creating an order (the return date can be viewed beside the "State" field of the Box module). This is only used when the "Use expected return dates" 262 field from the Customer Information module is set to Yes.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the box
ReturnDate - Return date given to the box when entering an order. The Return Date 262 option can be activated in the Customer Information module.
OrderNo - Order number

Buildings
Module: Building
Description: This table stores the information viewable in the Building module.
Important Fields:

BuildingNo - EDC generated building number.
BuildingStr - This is the abbreviation used throughout the software for that specific building.
Description - This is the description of the building that was entered in the description field.
AddrLine1 - Building address
AddrLine2 - Building address
City - City
State - State
PostalCode - PostalCode
Country - Country
ContactName - Name
ContactPhoneNo - Phone number
ContactFax - Fax
ContactPhoneExt - Phone extension

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StatThresholdMins - Statistic threshold[355]
MultiTransitLocation - Boolean FieldType (the values must be + or -) specifying if the building has multiple transit locations

Business Type
Module: Business Type
Description: This table stores all the information viewable in the Business Type module.
Important Fields:

Code - Business type code
Description - Business type description

Customer
Module: Customer Information
Description: This table stores the information viewable in the Customer Information module.
Important Fields:

CustKey - Key assigned to each customer at their creation.
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.

Cust_Document_Memo
Module: Retention schedule
Description: This table stores the information viewable in the Retention Schedule module, when pressing on **F4** or when clicking on **View -> Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the DocTypeNo
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Cust_Document_Type
Module: Retention Schedule
Description: This table stores all the information viewable in the Retention Schedule module.
Important Fields:

Active - Boolean FieldType (the values must be + or -) indicating if the record series is active
ActiveDisposal - See the Activity Codes[775] topic
ActiveRet - Active retention period (in months)
*AutoIndexBoxes - Boolean FieldType (the values must be + or -) indicating if the boxes will be indexed automatically
*AutoIndexFiles - Boolean FieldType (the values must be + or -) indicating if the files will be indexed automatically
*AutoIndexImages - Boolean FieldType (the values must be + or -) indicating if the images will be indexed automatically
Classified - Boolean FieldType (the values must be + or -) indicating if the record series is classified
Code - Document type code
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DocTypeNo - EDC generated number assigned to each document type
EnglishDesc - English description

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FinancialEval - Financial Evaluation field
FrenchDesc - French Description
LegalEval - Legal Evaluation field
MainDeptNo - EDC generated number assigned to each department
OcrTemplateNo - EDC generated number assigned to each OCR template (these templates are only available when a customer is replicated with the Record Center).
SemiActiveDisposal - See the Activity Codes[775] topic
SemiActiveRet - Semi-active retention period (in months)
SubDeptNo - EDC generated number assigned to each sub-department

Cust_Source_Loc
Module: Source Location
Description: This table stores all the information viewable in the Source Location module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
Location - Location name
AddrLine1 - First line of the location's address
AddrLine2 - Second line of the location's address
City - City
State - State
PostalCode - Postal Code
Country - Country
PhoneNo0 - Phone number

Customer_Holiday
Module: Customer Holiday
Description: This table stores all the information viewable in the Customer Holiday module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
HolidayDate - Date of the holiday
Description - Description

Customer_Price
Module: Customer Pricing
Description: This table stores all the information viewable in the Customer Pricing module.
Important Fields:

TaxCalculation - See the Activity codes[778] topic
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
PriceCode - Price code
RateByTime - Time
UnitType - See the Activity codes[778] topic
Rate - Rate
Break - Price break (see the Activity codes[778] topic)
Description - New description

Customer_User

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Module: Authorized User
Description: This table stores all the information viewable in the Authorized User module.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
UserNo - EDC generated user number which can be seen in the current module under the System field.
FirstName - First name
LastName - Last name
MiddleInitial - Middle initial
PhoneNo - Phone number
Language - Default language (English = 0, French = 1)
ForcePassword - Boolean FieldType (the values must be + or -)
Active - Boolean FieldType (the values must be + or -)
Password expires - Boolean FieldType (the values must be + or -)
LastPasswordChange - Date entered by the system to keep track of the changes
ExpireAfterDays - Password expiration
ChangePassNextLogon - Boolean FieldType (the values must be + or -)
LoginName - Login name
EmailAddress - Email address
WorkingDirectory - Working directory
PhoneExt - Phone extension

Del_Address_Memo
Module: Delivery Address
Description: This table stores the information viewable in the Delivery Address module, when clicking on **View -> Notes**.
Important Fields:

ForeignID - In this case, this field corresponds to the DelAddrNo
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

Deleted_Order_Item
Module: Deleted Order
Description: This table stores all the information viewable in the Deleted Order module.
Important Fields:

ItemType - (Box = 1, File = 2)
OrderNo - Order number
PriceCode - Price code that was not charged
Deleter - Person that deleted the order
DDNo - RC number of the item
Description - Description
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DeletedDate - Date of the deletion
DeletedTime - Time of the deletion

Delivery
Module: Delivery verification

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Description: This table stores all the information viewable in the Delivery Verification module.
Important Fields:

DeliveryNo - Delivery number
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
QuantityShipped - Quantity of items shipped
QuantityReturned - Quantity of items returned
DeliveryDate - Date of the delivery
State - See the Activity codes[775] topic
RouteNo - Route number
Building - Building
CheckInDate - Arrival date
CheckInTime - Arrival time
CheckOutDate - Departure date
CheckOutTime - Departure time
DeliveredByEmpNo - Refers to the EmployeeNo of the person that delivered the items
ServiceOnlyBilled - Indicates if the delivery was only billed for service (and not for rent).

Delivery_Address
Module: Delivery Address
Description: This table stores all the information viewable in the Delivery Address module.
Important Fields:

DelAddrNo - EDC generated number
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
AddrLine1 - First line of the address
AddrLine2 - Second line of the address
City - City
State - State or province
PostalCode - Postal code
Country - Country
ContactName - Name
ContactPhoneNo - Phone number
ContactFax - Fax
ContactPhoneExt - Phone extension
PercentSurcharge - Percent surcharge
Active - Boolean FieldType (the values must be + or -)
NoChargeRegDelivery - Boolean FieldType (the values must be + or -)
DailyReturn - Boolean FieldType (the values must be + or -)
DailyReturnQuty - Daily return quantity

Delivery_History
Module: Delivery Verification
Description: This table stores the information viewable in the Delivery Verification module, when clicking on **View -> History**.
Important Fields:

Activity - See the Activity Codes[775] topic
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - Refers to the DeliveryNo

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HxDate - Date of the modification
HxTime - Time of the modification
Person - Name of the person that performed the modification or description of the modification.

Delivery_Route
Module: Delivery Route
Description: This table stores most of the information viewable in the fields from the Delivery Route module.
Important Fields:

EmployeeNo - EDC generated employee number, which can be seen in the Employee module under the Number field.
RouteNo - Route number
StartDate - Date
StartTime - Time
State - See Activity Codes 778 topic
VehicleNo - EDC generated vehicle number

Delivery_Route_Stop
Module: Delivery Route
Description: This table stores the information viewable in the main window of the Delivery Route module.
Important Fields:

ArrivalTime - Arrival time
DeliveryNo - Delivery number
DepartureTime - Departure time
Position - Position in the window
RouteNo - Route number

Delivery_Type
Module: Delivery Type
Description: This table stores all the information viewable in the Delivery Type module.
Important Fields:

BRETPriceCode - Box return price code
Courier - See the Activity Codes 778 topic
DeliveryTime - Time
DeliveryTypeNo - EDC generated delivery type number
EnglishDesc - English description
FrenchDesc - French description
FRETPriceCode - File return price code
Ordering - Ordering
PriceCode - Price code
ShipMode - See the Activity Codes 778 topic
SurchargePriceCode - Surcharge price code

Department
Module: Department
Description: This table stores most of the information viewable in the Department module.
Important Fields:

Coordinator - Coordinator
CoordinatorAddr - Address of the coordinator

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CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
Description - Department description
MainDeptName - Name
MainDeptNo - EDC generated department number
Supervisor - Supervisor
SupervisorAddr - Address of the supervisor

Employee
Module: Employee
Description: This table stores most of the information viewable in the Employee module.
Important Fields:

AddrLine1 - First line of the address
AddrLine2 - Second line of the address
AddrLine3 - Third line of the address
BirthDay - Birth day
ChangePassNextLogon - Boolean FieldType (the values must be + or -)
City - City
Country - Country
EmployeeNo - EDC generated employee number
ExpireAfterDays - Number of days before the password expires
FirstDay - First date of the Duration field
FirstName - First Name
ForcePassword - Boolean FieldType (the values must be + or -)
Language - Default language (English = 0, French = 1)
LastDay - Second date of the duration field
LastPasswordChange - Date entered by the system to keep track of the changes
LoginName - Login name
MiddleInitial - Middle initial
PasswordExpires - Password expiration
PhoneNo0 - Phone number
PositionLine1 - Position field
PositionLine2 - Position field
PostalCode - Postal code
State - State or province

Employee_Group
Module: Employee Group
Description: This table stores most of the information viewable in the Employee Group module.
Important Fields:

GroupNo - EDC generated group number
Name - Group name

Employee_Statistics
Description: This table keeps track of most of the operations performed by employees.
Important Fields:
Building - Building
EmployeeNo - EDC generated employee number
EndDate - End date of the action
EndTime - End time of the action
ItemType - See the Activity codes 776 topic

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MistakeCount - Number of mistakes in total
MistakePerHour - Average of mistakes per hour
OperationType - See the Activity codes 776 topic
StartDate - Start date of the action
StartTime - Start time of the action
SuccessCount - Number of successes
SuccessPerHour - Average of successes per hour

Folder
Module: File
Description: This table stores most of the information contained in the File module.
Important Fields:

AccessLevel - Access level of the file
Activity - See the Activity Codes 773 topics
BoxDDNo - RC number of the box
CustBoxNo - Box number
CustFileNo - File number
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
Description - Description
DestDate - Destruction date
DestType - Destruction type (see the Activity Codes 775 topic)
DocTypeNo - Document type number given by the system
EndDate - End date
EntryDate - Entry date
FileDDNo - RC number of the file
FileOwner - File owner
MainDeptNo - Department number given by the system
OldCustFileNo - Old file number
RangeFrom - Range from field
RangeTo - Range to field
ShelfLocationNo - EDC generated shelf location number, which can be seen in the Shelf location module under the System field.
SourceLoc - Source location
StartDate - Start Date
SubDeptNo - Sub-department number given by the system
UserField1 - Field 1
UserField2 - Field 2
UserField3 - Field 3
WithdrawalDate - Withdrawal date

File_History
Module: File
Description: This table stores all the information viewable in the File module, when pressing on **F3** or when clicking on **View -> History**.
Important Fields:

Activity - See the Activity codes 773 topic.
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the file
HxDate - Date of the modification

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HxTime - Time of the modification
Person - Name of the person that performed the modification or description of the modification.

File_Internal_Memo
Module: Internal Note
Description: This table stores the information contained in the Internal Note module, when clicking on **File -> Internal Notes -> File**.
Important Fields:

ForeignID - Refers to FileDDNo
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

File_Memo
Module: File
Description: This table stores the information viewable in the File module, when pressing on **F4** or when clicking on **View -> Notes**.
Important Fields:

ForeignID - Refers to FileDDNo
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

File_Memo_2
Module: File
Description: This table stores the information viewable in the File module, when pressing on **F4** or when clicking on **View -> Secondary Notes**.
Important Fields:

ForeignID - Refers to FileDDNo
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
LineNo - Number given by the system to the text's line
TextLine - Text contained in the note

File_Return_Date
Module: File
Description: This table stores the information that is entered when specifying a return date when creating an order (the return date can be viewed beside the "State" field of the File module). This is only used when the "Use expected return dates" 262 field from the Customer Information module is set to Yes.
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the box or file
ItemNo - EDC generated number.
OrderNo - Order number.
ReturnDate - Return date that was entered when creating the order.

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Holiday
Module: Holiday
Description: This table stores all the information viewable in the Holiday module
Important Fields:

Description - Description given to the holiday
HolidayDate - Date of the holiday

List
Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the Disposal List, Transfer List, Deletion List module
Important Fields:

ListDDNo - EDC generated list number
Description - List description
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
UserNo - EDC generated authorized number
DestDate - Destruction date
ApprovedDate - Date the list was approved
ListType - See the Activity Codes 777 topic
DestType - See the Activity Codes 775 topic
CustListNo - List number viewable in the module
DeliveryNo - Number of the deliveries assigned to the list
OnPalletList - If the box is check off it means that the list has one or many pallets assigned to it.

List_Item
Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the Disposal List, Transfer List, Deletion List module
Important Fields:

ListDDNo - EDC generated list number
ItemType - See the Activity Codes 776 topic
DDNo - RC number of the item
CustItemNo - Customer number of the item
MainDept - Main department of the item
SubDept - Sub-department of the item
PickState - See the Activity Codes 777 topic
Volume - Volume of the item
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DocTypeCode - Document type code viewable in the Retention schedule module under the Type field
Location - Location of the item

Orders
Module: Order
Description: This table stores part of the information viewable in the Order module
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module

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under the System field.
DelAddrNo - EDC generated delivery address number
DeliveryDate - Delivery date
DeliveryNo - Delivery number
DeliveryTime - Delivery time
DeliveryTypeNo - EDC generated delivery address number
EntryDate - Entry date
EntryTime - Entry time
FastOrder - Boolean FieldType (the values must be + or -)
OrderNo - Order number
State - See the Activity Codes[776] topics
Taker - Employee name
UserNo - EDC generated user number, which can be seen in the Authorized User module under the System field.

Order_Item
Module: Order
Description: This table stores part of the information viewable in the Order module
Important Fields:

ChargeCode - Charge code associated with the item
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - RC number of the ordered item (it can be a box or a file)
DeliveryNo - Delivery number
ItemNo - Item number (position on the list)
ItemType - (Line Item = 0, Box = 1, File = 2)
ListDDNo - List number (this makes reference to a Disposal, a Transfer or a Deletion list)
OrderNo - Order number
PermanentlyOut - Boolean FieldType (the values must be + or -)
Pickable - Boolean FieldType (the values must be + or -)
PriceCode - Price code
Quantity - Quantity of each item
Recipient - Recipient

Pallet_Item
Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the Disposal List, Transfer List, Deletion List module
Important Fields:

PalletNo - EDC generated pallet number
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
BoxDDNo - Box RC number
Location - Box location
ListDDNo - EDC generated list number
ItemType - See the Activity Codes[776] topic

Pallet_List
Module: Disposal List, Transfer List, Deletion List
Description: This table stores some of the information viewable in the Disposal List, Transfer List, Deletion List module

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Important Fields:

PalletNo - EDC generated pallet number
CreationDate - Creation date of the list
State - See the Activity codes 777 topic
ListType - See the Activity Codes 777 topic
DestType - See the Activity Codes 775 topic
BoxTypeNo - EDC generated box type number

Price
Module: General Pricing
Description: This table stores part of the information viewable in the General Pricing module
Important Fields:

Break - Price break (see the Activity codes 778 topic)
EnglishDesc - English description
FrenchDesc - French description
GLCodeForBoxes - Exportation code for boxes
GLCodeForTapes - Exportation code for tapes
MinQty - Minimum quantity
OrderMin - Order minimum
PriceCode - Price code
Rate - Rate
RateByTime - Time
Stock - Left in stock
TaxCalculation - See the Activity codes 778 topic
UnitType - See the Activity codes 778 topic

Return_Item
Module: None
Description: This table stores the information concerning all the return items for each delivery.
Important Fields:

BoxSized - Boolean FieldType (the values must be + or -)
Building - Building the item was returned to
ChargeCode - Charge code
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
DDNo - Item's RC number
DeliveryNo - Delivery number
FilesScanned - Boolean FieldType (the values must be + or -)
FileDesc - File description
ItemType - See the Activity Codes 776 topic
OrderNo - Order number
PriceCode - Price code associated to each item
Quantity - Quantity returned
TransitLocationNo - EDC generated transit location number

Shelf_Location
Module: Shelf Location
Description: This table stores the information viewable in the Shelf Location module.
Important Fields:

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CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
Description - Description
Location - Location
LocationNo - EDC generated customer number, which can be seen in the Shelf Location module under the System field.
MediaType - Media type
OccupationDate - Date the location was first occupied
RangeFrom - Range from
RangeTo - Range to
TotalQuantity - Linear feet available for storage

Space
Module: Location
Description: This table stores the information viewable in the Location module.
Important Fields:

Accept all sizes - Boolean FieldType (the values must be + or -)
Capacity - Capacity
ExclusiveCustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field. In this case the location will be exclusive to the customer corresponding to the number entered.
Holding - Boolean FieldType (the values must be + or -)
InUnits - Number of items in the IN state
Location - Location
MainDeptNo - EDC generated department number. This field only applies if the field ExclusiveCustNo is filled.
OutUnits - Number of items in the OUT state
PriceCode - Price code associated to the location.
Tape - Boolean FieldType (the values must be + or -)
UnitSize - Unit size
Used - Number of spaces used
Vault - Boolean FieldType (the values must be + or -)

Sub_department
Module: Department
Description: This table stores the information viewable in the Department module, when one edits or adds a sub-department.
Important Fields:

SubDeptNo - EDC generated sub-department number
CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
MainDeptName - Main department name
SubDeptName - Sub-department name
RetentionYears - Retention years
MainDeptNo - EDC generated department number
Active - If the box is checked, then the sub-department is active
Description - Description

Transit_Locations
Module: Building
Description: This table stores the information viewable in the Building module, in the "Transit location"

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list.
Important Fields:

BuildingNo - EDC generated building number
Description - Description
Location - Location
TransitLocationNo - EDC generated location number

User_Group
Module: User Group
Description: This table stores part of the information viewable in the User Group module
Important Fields:

CustNo - EDC generated customer number, which can be seen in the Customer Information module under the System field.
GroupNo - EDC generated group number
Name - Group name

Note: When the values are of the boolean type, "+" means Yes and "-" means No.

10.12 Exporting an EDC report into Excel

Many of the older reports available through the **File -> View report** menu item can only be saved in a text format. If you need to work with this in a spreadsheet, you can do as follows:

1. Export the report in the txt format (save it)
2. Go in Excel. Click on **File -> Open**
3. Select "Text files (*.prn; *.txt; *.csv)" in the Files of type field
4. Click on the **Open** button.
5. Select the "Fixed width" option
6. Click on the **Next** button
7. Edit the column breaks as shown.
8. Choose the data column format (if necessary) or leave it as it is and press on the **Finish** button
9. The report should be exported correctly.

For reports in the **Inventory->Report** (SQL) module, you can obtain a spreadsheet through the following steps:

You may need to set it up as follows:
1. Open the report module in Edit mode.
2. Go to the Design tab.
3. From the menu, select File->Print to file set-up
4. For each band of the report, select the fields that you wish to include and their order.
5. Select a format - such as comma separated or fixed width, as well as a save name and location.

To get the output in a spreadsheet format:
1. On the preview tab, run the report.
2. Click on the Print button.
3. Check the print to file check box.
4. Change the save name and location.

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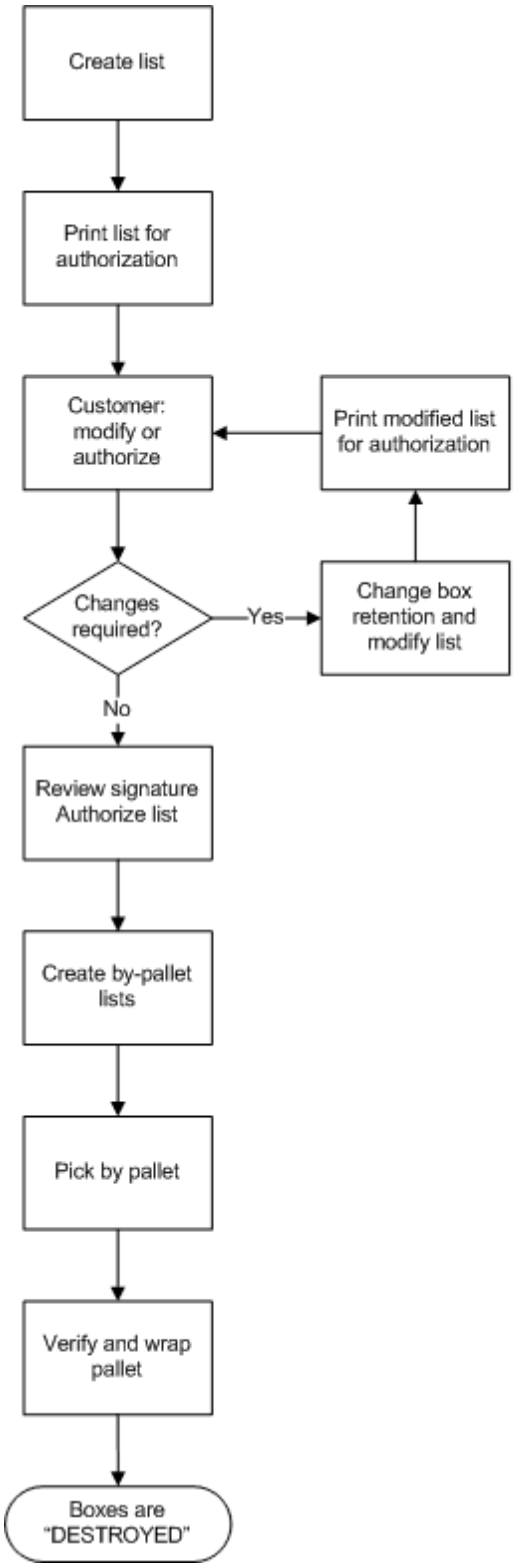
10.13 Disposal list workflow



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10.14 Interpreting warnings and error messages

The order is referenced by another user

An order can only be edited by one person at a time. If a network connection is lost while an order is being edited, this message may appear.

1. Note the order number
2. Verify with your colleagues that nobody is editing this order.
3. Open the **Orders->Delivery Maintenance** module.
4. From the menu, select **File->Unlock order**.
5. Enter the **order number**, and click **OK**.
6. Attempt to edit the order. You should now be able to.

Another user is currently accessing this functionality. Please trying again later. Computer Name:

Certain operations can only be accessed by one open window on one computer at a time, in order to prevent conflicts during saving and processing. If a network connection is lost while performing such an operation, the above message may appear

.

1. Verify with your colleagues that nobody is actually using the operation (egg, delivery creation, editing reports)
2. Open the **Management->System Information** module.
3. From the menu, select **Edit->Unlock operation**.
4. From the list, select the operation and click **OK**.
5. Attempt to access the functionality. You should now be able to.

Tape Schedule - Warnings

When creating a picking list, you may encounter the message "Tape Schedule - Warnings", followed by a list of tapes that are scheduled for delivery in the delivery period presently being picked.

If delivery creation has not yet been done for the tape deliveries, the appearance of items on this report indicates that items can not be added to orders as scheduled, typically because they are Out. This should be investigated (are the tapes still at the customer site? Were they just not scanned into the record center?).

If picking is done after delivery creation for the tapes, the tapes will have gone to the Out status. Therefore, you can ignore this warning when it appears when picking after tape delivery creation for that cycle.

Web errors

Error! Failed to read server's response: Connection refused: connect

This message typically indicates that the EDC RPC service has failed to start. One possible cause is that the password for the account used to start the service may have changed. Have your IT person start the EDC RPC service and use the event view to determine the cause of the failure.

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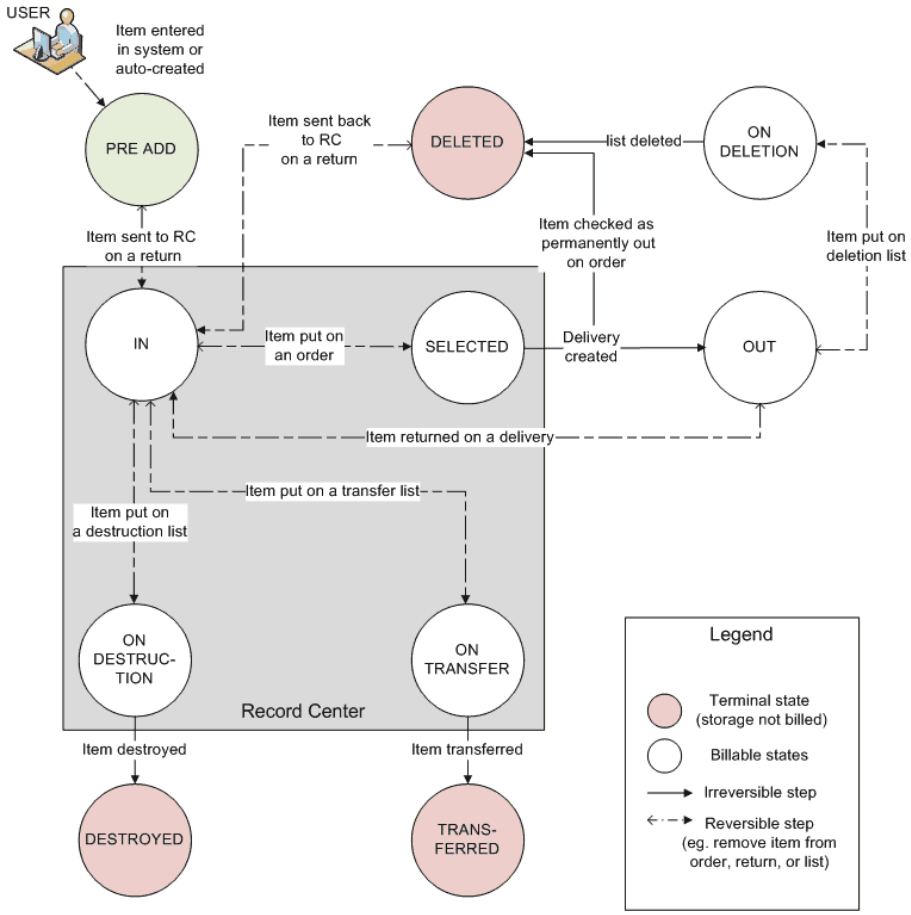
10.15 Item states



10.16 Tracked histories and their codes

EDCRC, ActiveWeb, and ActiveFile keep an audit trail of actions performed on your boxes, files, and documents.

The following table lists those histories, along with the code recorded in the history table, the corresponding string in the dictionary, and a longer description. This information is helpful when you are creating complex custom reports. You might also find this useful in presentations to clients who wish to know about what types of histories are tracked.

Code	String	Standard string	Comment
1	316	In	File or box currently In
2	3079	Out	File or box currently Out
3	318	Selected	File or box selected for order entry
5	320	Pre Add	File or box is in Pre Add

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6	321	Moved	File or box was moved
7	479	Searched	File or box was searched
8	3478	On Disposal	File or box is on a disposal list
9	618	On Transfer	File or box is on a transfer list
10	619	On Deletion	File or box is on a deletion list
11	614	Deleted	Box or file deleted (removed from active inventory)
12	615	Destroyed	Box or file destroyed (shredded) and removed from active inventory
13	3464	Transferred	Box or file transferred to other location or company and removed from active inventory
14	2036	In (in-house)	File or box in, at the clients in-house facilities
15	2037	Out (in-house)	File or box out, at the clients in-house facilities
16	2105	Dept. Transfer	Department of box or file has changed.
17	2127	Number Change	Box or file number has changed.
18	2128	Desc. Change	Box or file description has changed.
19	2129	Record series change	Box or file type has changed.
20	2143	Acc. Level Chng.	Box or file access level has changed.
21	2204	Disposal Chng.	Box or file disposition changed (date or disposition type)
22	2233	Volume Change	Box volume change
23	2272	Cardboard Change	Cardboard box change. For boxes only.
24	4719	PRE ADD Deletion	"Invisible" history added when a pre add box/file is deleted in ActiveFile, used for synchronization
25	2413	Images scanned	Images have been scanned within a file
26	2468	On Internal Transfer List	Box is being moved to a new location
27	2536	Destroyed (in-house)	File or box destroyed in house

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28	2830	Vault Change	Box "In Vault" field has changed.
29	111	Picked	Box or file has been picked.
30	617	Refiled	Box or file has been refiled
31	3057	Field 6 Change	box user field 6 has changed
32	3156	Printed	File label has been pre-printed on client side
33	3174	General Change	Other meta data field changed
34	3222	Change of hands	Item that is Out is transferred to a new recipient
35	3474	Sampled	Item removed from inventory using "sampling" method
36	3475	Revised	Item removed from inventory using "revision" method
37	3476	Sent to Depot	Item transferred from active to semi-active inventory using "send to depot" method
38	3674	Item Set Change	Item set of item has changed
39	3533	Added	When box first arrives at record center #3661
40	4170	Alt Label Change	
41	4624	Extra Field Change	
42	4573	Editable	eDoc can be checked out for modification
43	4574	In edition	eDoc is checked out for modification
44	4575	Finalized	eDoc cannot be modified, for consultation only}
45	4581	Added (electronic)	File record created, with the electronic status
46	4576	Viewed	eDoc viewed
47	4577	Checked out	eDoc checked out for modification
48	4578	Checked in	eDoc checked in after modification (version added)
49	4579	Check out canceled	eDoc modification canceled

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50	4580	Modified	eDoc -meta-data modified
51	4584	Electronic	Physical activity for records that have only an electronic from
52	4724	Emailed	eDoc sent by email
53	4766	UnFinalized	eDoc made editable again, after having been finalized
54	4794	Pasted	eDoc pasted
55	4925	Content password change	
56	4979	Return schedule chg.	Change in rotation schedule of a back-up tape
57	5015	Image indexchange	
58	5319	Images viewed	
59	5343	All images deleted	
60	5424	Notes Change	Changes made to the Notes meta data field
61	5425	Keywords Change	Changes made to keywords used for full-text search
62	5426	Imported	Record created or modified using Data import
63	5727	Document deleted	Document deleted within a file
64	4154	Excluded	Item was requested on an order but not provided

10.17 List of Knowledge Base (KB) articles

DocuData's knowledge base is another source of information about technical or specialized topics.

You may access the knowledge base by going to client.docudatasoft.com in your web browser and entering your DocuData customer key, user name, and password. These are the same credentials that you use for creating web licenses.

Alternatively, you may request these by e-mailing support@docudatasoft.com

Topic No	Description	EntryDate
28	KB00028 - Transfer boxes/tapes to another department	6/21/2001
36	KB00036 - Setting up EDC for automatic login using the windows login.	7/16/2001

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38	KB00038 - Defining the 20 additional fields in the file module	8/8/2001
66	KB00066 - Obtain DDF (data dictionary files) for EDC	3/26/2002
68	KB00068 - Activity codes used in the EDC database tables	4/15/2002
85	KB00085 - System price codes	5/10/2004
94	KB00094 - Cannot use full text search due to missing noisew.dat	7/13/2005
99	KB00099 - Rights required to access ActiveWeb	1/27/2006
100	KB00100 - PDT communication problems	2/2/2006
101	KB00101 - Pervasive error 171	5/24/2006
104	KB00104 - Destruction of all boxes on a big return	5/30/2006
111	KB00111 - Customizing the RCWeb & ActiveWeb's User interface	7/25/2006
112	KB00112 - Adding by-the-minute or hourly charges in EDC	7/26/2006
113	KB00113 - Uninstalling services	7/31/2006
115	KB00115 - How types by department work	8/1/2006
116	KB00116 - Updating EDC	8/1/2006
117	KB00117 - Use of Authorized User’s Login Name in EDC	8/15/2006
118	KB00118 - Creating a new configuration file (dc.cfg) using the DcSetp32 utility	8/15/2006
119	KB00119 - Performing backups of EDC	8/15/2006
121	KB00121 - Setting the timeout of RC Web and Active Web	8/21/2006
122	KB00122 - EDC security	8/29/2006
123	KB00123 - Citrix Thermal Printing for EDCRC or EDCCL	8/30/2006
124	KB00124 - Using Citrix application sharing with Thermal printing setup	8/30/2006
125	KB00125 - How to change the logo on the invoice and delivery slips	8/30/2006
126	KB00126 - Converting a non-vault box to a vault box	9/20/2006
127	KB00127 - Configuring Acrobat Reader Pro to open PDF's from RCWeb or ActiveWeb	11/9/20

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		06
128	KB00128 - How to rebuild the error log files (and any P.SQL table) to reduce file space	12/20/2006
129	KB00129 - How to purge the error logs of EDC RC & EDC Client	2/16/2007
130	KB00130 - Exporting Customer Data From EDC RC	2/19/2007
131	KB00131 - Usage of the DcLock32 program	4/23/2007
132	KB00132 - How to import images in batch inside EDC	5/14/2007
133	KB00133 - Allow Pervasive Administrative functions through Terminal Services Sessions	5/16/2007
134	KB00134 - How to create a new Dc.cfg file using the DcSetp32 utility	5/17/2007
135	KB00135 - How to change the search date in sql reports to match to the date mask defined in the system information module	5/17/2007
136	KB00136 - Defragmentation and other tips to increase system performance	5/17/2007
137	KB00137 - How to export a customer's inventory	5/17/2007
138	KB00138 - How to configure and use Imaging-on-demand with EDC	8/27/2007
139	KB00139 - How to configure Acrobat Reader to use defined file names in ActiveWeb and RCWeb	8/29/2007
140	KB00140 - Configuring EDC to export invoice data in QuickBooks format	10/29/2007
141	KB00141 - Configuring annoucement pages in RCWeb for different customers	1/21/2008
142	KB00142 - Setting up commissions reports in EDC RC	1/22/2008
145	KB00145 - Using separator pages with DocScanPro imaging software	3/12/2008
146	KB00146 - Antivirus software may cause P.SQL error 85	4/1/2008
147	KB00147 - Correspondence (interfile) refiling	4/4/2008
148	KB00148 - Installing EDM on Citrix	4/29/2008
149	KB00149 - Updating Pervasive	7/8/2008
150	KB00150 - Troubleshooting Pervasive SQL error #85	8/20/2008
151	KB00151 - How to use service-only invoicing	9/22/2008
152	KB00152 - Installing Tomcat with IIS7	8/21/2009

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153	KB00153 - How to import SQL reports into the SQL report module	9/21/2009
154	KB00154 - How to use the transym OCR engine	10/2/2009
155	KB00155 - How to add a custom report layout for a customer on RC Web	10/7/2009
156	KB00156 - How to add an item that has accidentally been excluded from a by time order	10/8/2009
157	KB00157 - Remembering or not the avanced search filters on the web	10/16/2009
158	KB00158 - Error: The order is referenced by another user	10/22/2009
159	KB00159 - How to assess internet connection stability	10/22/2009
160	KB00160 - Exporting invoices to MYOB accouning software	10/23/2009
161	KB00161 - Labels misaligning with Zebra S4M	10/26/2009
162	KB00162 - Updating a previous installation of Pervasive	10/28/2009
163	KB00163 - Reports available for import through the Inventory->Report(SQL) module	10/28/2009
164	KB00164 - Data Import in EDC RC WEB	11/10/2009
165	KB00165 - Billing for periodic line-item charges such as web access on storage invoices	11/26/2009
166	KB00166 - Installing the Zebra printers with the Seagull Scientific	12/4/2009
167	KB00167 - How to recover missing EDM buttons in office 2003 & 2007 applications	3/24/2010
168	KB00168 - How to add barcodes and notes fields to SQL reports	4/9/2010
169	KB00169 - How to activate and de-activate a Pervasive License	5/18/2010
170	KB00170 - Checklist for Ontario tax conversion	6/28/2010
171	KB00171 - 12019 or related error when logging into ActiveWeb	7/7/2010
172	KB00172 - Limiting locations to accept only a specific box size	7/19/2010
173	KB00173 - How to install PDF, Word, Excel, Powerpoint viewing support in EdcRpc service	7/23/2010
174	KB00174 - How to configure and print certificates of destruction for disposal lists	10/28/2010
175	KB00175 - How to cancel web licenses	11/2/2010
176	KB00176 - How to setup customer address alignment on invoice to fit in enveloppe	11/8/20

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	window	10
177	KB00177 - Selecting a thermal printer	12/29/2010
178	KB00178 - Setting up EDC tunnel as a service	2/21/2011
179	KB00179 - Importing Authorized Users' information	2/21/2011
180	KB00180 - Installing an SSL certificate	3/7/2011
181	KB00181 - Stretched font issue when formatting reports via Remote Desktop	3/31/2011
182	KB00182 - Using separator pages with Kodak Capture Pro imaging software	3/31/2011
183	KB00183 - How to use the Print to File Setup" to export SQL reports to CSV format cleanly"	5/17/2011
184	KB00184 - How to reset the PDT	11/21/2011
185	KB00185 - How to setup the RCWeb Portal	2/28/2012
186	KB00186 - How to redirect COM ports for PDT use on Windows Server 2003	7/20/2012
187	KB00187 - How to configure EDC for use with MongoDB	9/13/2012
188	KB00188 - How to install EDCView on your computer	10/4/2012
189	KB00189 - How to install the EDM Setup for use with ActiveWeb	11/14/2012
190	KB00190 - Unable to search authorized users by customer name	7/3/2013
191	KB00191 - How to configure EDC to work with the Tesseract OCR engine	7/16/2013
192	KB00192 - How to use internal transfer lists	7/18/2013
193	KB00193 - How to update the firmware in the Opticon H13 PDT	7/30/2013
194	KB00194 - Price Not Found error	8/23/2013
195	KB00195 - How to reprogram the OS on the Opticon PDT's	9/19/2013
196	KB00196 - Zebra Technical Support Details	10/16/2013
197	KB00197 - Backing Up EDC	10/21/2013
198	KB00198 - EDM Addin in Office Not In Ribbon	10/31/2013
199	Managing Pervasive Licenses	10/2/2014

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10.18 List of video tutorials on DocuData's YouTube channel

The following is a listing of DocuData's videos available through our YouTube(TM) channel. You may also search our channel at www.youtube.com/docudata, where you will find play lists and videos.

You will also find these videos embedded throughout this manual where we discuss the related topics.

If you wish to download any of these videos in MP4 format for offline use, you may do so using one of many free online tools for this purpose, such as http://keepvid.com/

Video Title	Video Link	Uploaded
2) Tips for PHL2700 protective sleeve	https://www.youtube.com/watch?v=rPfDXulRUac	2009-11-01
EDC DataCapture™	https://www.youtube.com/watch?v=JexOassk2Vs	2009-11-14
Pervasive 10 Server Engine Install & Configuration for EDC RC™ Software	https://www.youtube.com/watch?v=RZHRkTLS83g	2010-02-09
Pervasive 10 Client Install & Configuration for EDC	https://www.youtube.com/watch?v=oT8YMR_0QT8	2010-02-09
How To Update Your EDC Licence Key	https://www.youtube.com/watch?v=6KYuqTS52yg	2010-02-09
Pervasive 10 Workgroup Install & Configuration part 1	https://www.youtube.com/watch?v=Zvp9iducPvw	2010-02-15
Pervasive 10 Workgroup Install & Configuration part 2	https://www.youtube.com/watch?v=VZ4H0jLx4do	2010-02-15
Data imports- Part 3 - Importing data	https://www.youtube.com/watch?v=7NEgq29VC20	2010-02-16
Data Imports: Source Data	https://www.youtube.com/watch?v=d_HAZUT-4eI	2010-02-17
Data Imports: General concepts	https://www.youtube.com/watch?v=rmA4lB0lKa8	2010-02-22
Logging into ActiveWeb™	https://www.youtube.com/watch?v=unK-vRbkS6w	2010-10-25
Searching for an item in MyActiveRecords™	https://www.youtube.com/watch?v=JZBA0enxqcQ	2012-03-26
Editing an item in MyActiveRecords™	https://www.youtube.com/watch?v=SOjUS-ZnPYA	2012-03-26
Navigating in MyActiveRecords™	https://www.youtube.com/watch?v=aTg12QjdSJw	2012-04-02
Setting Up MyActiveRecords™	https://www.youtube.com/watch?v=iZgN4SUmbsA	2012-04-18
label_editor_preview.mp4	https://www.youtube.com/watch?v=qGs4Me1VzhY	2012-05-04

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MyActiveRecords™ goes mobile!	https://www.youtube.com/watch?v=p8HJyHEvBQs	2012-05-10
Installing Client DSN for EDC RC™ Software	https://www.youtube.com/watch?v=GNkRwdfxLEQ	2012-06-07
1) Introduction to the Handheld Scanner	https://www.youtube.com/watch?v=jRTmQtKLm8c	2012-06-07
SQL Reports Part 1 - Overview	https://www.youtube.com/watch?v=dqcKIEXH7Ro	2012-06-07
Adding Your First Boxes to MyActiveRecords™	https://www.youtube.com/watch?v=g4hygWQQGOI	2012-06-07
How to place an order in ActiveWeb™	https://www.youtube.com/watch?v=As-UoMJEdjM	2012-07-10
Promotional Video of ActiveWeb™	https://www.youtube.com/watch?v=e7tT5KipVoI	2012-07-10
Managing Electronic Documents in Activeweb™	https://www.youtube.com/watch?v=vX9Faqkz4DE	2012-07-10
Setting up Customers for Imports in ActiveWeb™	https://www.youtube.com/watch?v=Y_YKFcooCIo	2012-07-10
How to Perform Searches in ActiveWeb™ (Version 5.70 or higher)	https://www.youtube.com/watch?v=buey95DUPns	2012-07-10
Managing Images in ActiveWeb™	https://www.youtube.com/watch?v=d_DL6AgdD2M	2012-07-10
Importing Information in ActiveWeb™	https://www.youtube.com/watch?v=lgDfivV_kio	2012-07-10
MyActiveRecords Promo Video	https://www.youtube.com/watch?v=acgjp4QpBOo	2013-02-20
MyActiveRecords	https://www.youtube.com/watch?v=-zBZeoDKagA	2013-03-07
Navigating in EDCRC	https://www.youtube.com/watch?v=dNO6-KuGxas	2013-03-22
Hosting images in EDCRC and ActiveWeb	https://www.youtube.com/watch?v=RO-jtXUlGWk	2013-03-27
MyActiveRecords	https://www.youtube.com/watch?v=M60hrr7NTY4	2013-03-28
Customizing the look of your record center	https://www.youtube.com/watch?v=TamLqAjarak	2013-04-01
Core ActiveWeb Functionality - Part 1- Logging in, home page, and license options	https://www.youtube.com/watch?v=NmZyB9wn-Pg	2013-04-04
Core ActiveWeb Functionality - Configuration	https://www.youtube.com/watch?v=9adMkOzpURo	2013-04-08
Tapes at the RC	https://www.youtube.com/watch?v=EudoStkopBo	2013-04-23

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Imports and description files (Including advanced details, following data import SOP)	https://www.youtube.com/watch?v=zebCK-Q_OPA	2013-04-25
Core ActiveWeb Functionality 3a Working with boxes	https://www.youtube.com/watch?v=Dv4xaHcqI-c	2013-04-26
Core ActiveWeb Functionality 3b Working with files	https://www.youtube.com/watch?v=oQOsVP1yzWM	2013-04-26
Core ActiveWeb Functionality 3d Placing orders	https://www.youtube.com/watch?v=FgR2T-bnAwI	2013-04-26
Configuring billing in EDCRC Organization and price codes	https://www.youtube.com/watch?v=JUz_otAvDUg	2013-05-03
Tape management in ActiveWeb	https://www.youtube.com/watch?v=n-LImVAwc5I	2013-05-08
Tapes in ActiveWeb	https://www.youtube.com/watch?v=VE86dK-9huw	2013-05-10
Configuring billing in EDCRC Services	https://www.youtube.com/watch?v=QJrq7Q2Inug	2013-05-28
Configuring billing in EDCRC Storage	https://www.youtube.com/watch?v=EKAK60dn_tY	2013-05-28
Configuring billing in EDCRC invoice charges	https://www.youtube.com/watch?v=SteoPm_GOso	2013-05-28
Convert EDC Text to Excel Spreadsheet	https://www.youtube.com/watch?v=iMdGhoMW-m8	2013-07-08
MyActiveRecords	https://www.youtube.com/watch?v=mTyvgWeeKc8	2013-07-15
ActiveWeb	https://www.youtube.com/watch?v=gJVQtcZm6nw	2013-07-23
ActiveFile	https://www.youtube.com/watch?v=14Q-n98Ls-g	2013-09-06
ActiveFile/DocuDepot	https://www.youtube.com/watch?v=r0WwvDID0Lc	2013-09-16
ActiveWeb Promo Video for DocuDepot	https://www.youtube.com/watch?v=0pZ4KKZongo	2013-10-10
Shredding in EDCRC	https://www.youtube.com/watch?v=oAao_lumPY4	2013-12-06
Hosting images in EDCRC and ActiveWeb Part 1 Benefits to the client	https://www.youtube.com/watch?v=EYwtYxPCL_M	2014-01-07
Hosting images in EDCRC and ActiveWeb Part 2 Batch Importing Images	https://www.youtube.com/watch?v=EGBRsA6ejQc	2014-01-07
Testing Your HDD with DiskTT	https://www.youtube.com/watch?v=Qp1uGXdKzD4	2014-01-08
Tomcat SSL howto	https://www.youtube.com/watch?v=OOFMpUZjito	2014-01-09

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Updating Boxes with the wizard	https://www.youtube.com/watch?v=CeWekrkl2gU	2014-01-09
Quickbooks and EDC howto	https://www.youtube.com/watch?v=OcNGbkjbkto	2014-01-09
Invoicing 001 Overview	https://www.youtube.com/watch?v=drR2ZIMUMto	2014-01-09
Basic PC Troubleshooting	https://www.youtube.com/watch?v=3OJNITa6OWs	2014-01-09
EDC Backups	https://www.youtube.com/watch?v=firn4NDc4Fc	2014-01-09
EDC Redirector Howto	https://www.youtube.com/watch?v=DrcZuOyRa9I	2014-01-09
Invoicing 002 pricing modules	https://www.youtube.com/watch?v=KovMX4XAsxg	2014-01-09
how to troubleshoot PDTs	https://www.youtube.com/watch?v=oSMpeCQ7DvE	2014-01-09
Deactivate and Activate Pervasive Licenses	https://www.youtube.com/watch?v=-T4mOflYl78	2014-01-13
Imaging procedures for ASR 001R	https://www.youtube.com/watch?v=Zpp2yUZcMbQ	2014-01-15
EDC Update from version 5 to 6 part1 - MongoDB install	https://www.youtube.com/watch?v=yjRpM4-W1yc	2014-01-16
EDC Update from version 5 to 6 part2 - EDC Update	https://www.youtube.com/watch?v=sNIOWWbjG90	2014-01-16
How to do a simple truck validation (without delivery routes)	https://www.youtube.com/watch?v=VnvjEScPxPU	2014-01-16
How to move boxes with the PDT	https://www.youtube.com/watch?v=p5RQaaxCDiE	2014-01-16
Manual returns in EDC	https://www.youtube.com/watch?v=sYW-RpHPhcI	2014-01-16
Returns with the PDT	https://www.youtube.com/watch?v=oIN9MH4o8UY	2014-01-16
How to make an unspecified return order in EDC	https://www.youtube.com/watch?v=L7cjqog9UDQ	2014-01-16
How to setup printers and PDT's with EDC RC	https://www.youtube.com/watch?v=VXz1Yr5VDlQ	2014-01-23
Introduction to rcMobile in EDCRC 6 25 Part 1 deployment	https://www.youtube.com/watch?v=iwISBGeGsTQ	2014-02-25
Introduction to rcMobile in EDCRC 6 25 Part 2 Tour of the interface	https://www.youtube.com/watch?v=9SBwro0gjXY	2014-02-25
Introduction to rcMobile in EDCRC 6 25 Part 3 Transport containers for packaging	https://www.youtube.com/watch?v=lcDwk-vr5KY	2014-02-25

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Introduction to rcMobile in EDCRC 6 25 Part 5 Delivery Routes	https://www.youtube.com/watch?v=X3BRDW2uMIM	2014-02-25
Introduction to rcMobile in EDCRC 6 25 Part 7 Delivery with rcMobile	https://www.youtube.com/watch?v=rSLHdUDtpAI	2014-02-25
Introduction to rcMobile in EDCRC 6 25 Part 4 Packaging	https://www.youtube.com/watch?v=EUYupQBlVzQ	2014-02-25
Introduction to rcMobile in EDCRC 6 25 Part 6 Truck Validation	https://www.youtube.com/watch?v=K81KoNVK2GM	2014-02-25
Introduction to rcMobile in EDCRC 6 25 Part 8 Unloading	https://www.youtube.com/watch?v=UGEyzoIKiEo	2014-02-25
Shredding 6 35 01 Intro	https://www.youtube.com/watch?v=pyq04ana0Ak	2014-03-19
Shredding 6 35 02 purge	https://www.youtube.com/watch?v=AY2DXtYsGDg	2014-03-19
Shredding 6 35 04 recurring	https://www.youtube.com/watch?v=0LfiYJhIz54	2014-03-19
Shredding 6 35 03 calendar	https://www.youtube.com/watch?v=FNKxtmiLpUw	2014-03-19
Shredding in EDCRC 6 35 processing in progress	https://www.youtube.com/watch?v=YE39JTCXGmQ	2014-03-19
Configuring Announcement on ActiveWeb login page	https://www.youtube.com/watch?v=8hCUu2UVLmQ	2014-03-31

10.19 Commonly modified dictionary strings

We generally advise against modifying terms in EDCRC without good reason, since this can make it more difficult for you to understand this manual and communicate with DocuData. However, there are many terms that can an should be modified in order to customize your software to your own needs. Please see the topic on how to Modify terms used in EDCRC[361]

String number	Default	Comment
651		Record center name
1013		Default city
1014		Default province / state
1667-1674		Various tax fields
2483-4		Tax numbers
5945		Invoice e-mail body text
5795	<Blank>	Customize ActiveWeb login screen
5907-14		Shredding certificate wording
5915		NAID Certified comment

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10.20 List of favourite reports

The **Inventory->Report(SQL)** module permits you to create your own reports and import reports from DocuData.

The following is a list of reports available for download. Over the coming year, we will modify this list to highlight those that EDCRC users have found most useful. Note that additional reports are available for download, DocuData has a collection of reports available for special purposes, and you may also request the creation of additional specialized reports, for a fee.

Please also see Running custom reports in the report module 201

****
ORDERS: Route Templates (6/17/2005 # 3)
****
This report will list all the different templates you have made for your routes in "Delivery Route"
****
ORDERS: Delivery type indexing report (6/17/2005 # 4)
****
This report will display all of your delivery types indexed by ordering number.
****
ACCOUNTING: Invoice Totals (6/17/2005 # 5)
****
This report will list all invoices in between a date range and display the invoice name, invoice date, customer name, net amount, tax a, tax b, and total.
The report will total all the invoices on the report to give you a grand total.

****
ACCOUNTING: Invoice Totals for a Customer (6/17/2005 # 6)
****
This report will total all the invoices between a date range for a single customer.

****
ACCOUNTING: Item Search by Delivery (6/17/2005 # 7)
****
This report will be able to view a price code by delivery within a date range. The report will let you know every delivery that has that price code and for which customer it is.
****
ACCOUNTING: Search in Invoices for a Price code by Date (6/17/2005 # 8)
****
This report will look in the invoice data and find any invoices that have a certain price code. You can search within a date range.

****
ACCOUNTING: Invoices by Price Code by Client within a Date Range (6/17/2005 # 9)
****
This report will display all the invoices with a certain price code and will total all price codes within a date range.
****

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ACCOUNTING: Customer Pricing Overrides (6/17/2005 #10)
****
This report will list all customer price overrides or only one customer's price overrides
****
ORDERS: Return Items on Orders with no Delivery (11/23/2005 #11)
****
This report will show you all orders that have return items where a delivery has not yet been created. You can see the customer, quantity of returned items and the expected pick-up date.
****
ORDERS: Order Quantities for a date range by customer (11/25/2005 #12)
****
This report allows you to view all orders by type, by date range for a specific customer or for all customers and gives you a total of orders for the date range selected at the bottom of report.
****
ACCOUNTING: Customers by billing building (11/25/2005 #13)
****
This report will allow you to view all clients by billing building. You will see the customer key, the name, and the billing building by alphabetical order.

****
ACCOUNTING: General Pricing (11/28/2005 #14)
****
This report allows you to list all Price codes including the description of the codes and the GL it relates to for boxes and for tapes accounts.
****
PRODUCTIVITY: Employee Performance Stats (8/7/2008 #91)
****
This report allows you to view employees' performance statistics when using a PDT for a date range. The report lists the type of operation, item type, total number of successful and unsuccessful scans, number of successful and unsuccessful scans per hour, success ratio, the time spent on each type of activity, the number of separate activities performed and the average number of items scanned per activity for the date range.
****
INVENTORY: Detailed Box Inventory Report by Location (11/28/2005 #16)
****
This report will allow you to see all boxes within a location range by customer or for all customers. It will list the box #, description, department, type, start date and end date, destruction type and destruction date, entry date and activity. Gives a grand total of boxes at the end.
If you do a report for all customers with a location range you will have total per customer and a grand total at the end of report for all customers.

****
INVENTORY: Detailed Inventory Report for a Customer (11/28/2005 #17)
****
This report will allow you to see all boxes for one customer.
It will list at the top of the page the customer number and name. Then you will see per box#,the description, the department, the type, the start date and end date, the destruction type and date, the activity.

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At the end of report you will get a total of boxes.

****
INVENTORY: Wild card Box Number Search (12/7/2005 #18)
****
This report will let you search for one client by customer system number or for all clients. In the search options you can indicate that you want to see all boxes that finish with a specific letter or number. EX: %2 (will list all of the boxes which finishes with a 2 etc...
The report will list the box number, the activity, the description and the location.
****
INVENTORY: Detailed File Inventory Report (12/28/2005 #25)
****
This report allows you to do a detailed file report by customer as of the present date. You will get the following information:
file number, description, department, type, start date, end date, destruction type, destruction date, entry date, activity and the box number the file is IN.

****
INVENTORY: Overdue Items (12/28/2005 #26)
****
This report allows you to do a search by boxes and files and by return date. You can bring up what is due for a specific date and also bring up anything prior to that date. You can search for all customers or for one customer.
The report will list the due date, the recipient name at the time of the order, the client name (customer key), the order number, the box or file number, the description of the box or file

****
ORDERS : Order Details by Customer & Date Range (7/11/2006 #62)
****
In the search criteria, you can select which customer + the date range for which you want the order details.
The order details are as follows:
=- Customer
- Entry Date
=- Order Number
=- Order Caller
=- Order Taker
=- Delivery Number
- Delivery Date
=- Delivery Address
****
SYSTEM ADMINISTRATION: Event log (1/17/2006 #28)
****
Report to display the Event-Error log with only one line per event. The following fields can be filtered upon: Description (Wild cards can be used), Event date, program name, severity of event, workstation name. The "%" wild card is used to replace several characters and the "_" wild card is used to replace one character.

****
SYSTEM ADMINISTRATION: Full Text Indexing Status (1/25/2006 #29)

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****
This report is useful to determine when a customer's items were last indexed at the record center for Full Text Search. Note that a customer's items are only indexed 30 minutes after any change occurs.
****
INVENTORY: Number of Images per File (1/30/2006 #30)
****
This report allows you to view the number of images per files by RC number for a specific client (system number) or for all clients (system numbers).
****
INVENTORY: Box Listing per Box Type (1/30/2006 #32)
****
Report will list the total number of boxes for a specific customer by box type as of the present date and time. The report lists the following columns: customer no., box no., box status, box type, box description & start and end date. At the end of the report you will get a Total number of boxes.
****
INVENTORY: Box Listing per Box Type per Customer (9/8/2009 #00)
****
Report allows searching either for a specific customer or for all customers. You will see by Customer key, the number of boxes they have per box type.
****
SYSTEM ADMINISTRATION: Operation Locks (1/31/2006 #34)
****
This report will let you know which employee/computer is locking which operation

****
CUSTOMERS: Customers Using EDC Software (1/31/2006 #35)
****
Report will list all clients who use EDC Client Software as of the present date. You will see the customer key, the customer name and business type with a total on the last page.
****
CUSTOMERS: Customer Billing Names (1/31/2006 #36)
****
This report will list all of your customers by Billing Name as of the present date. You will see the Billing Name in alphabetical order with the actual Name of customers and the Customer number. Gives a Total on last page.
****
CUSTOMERS: Customers by Business Type (1/31/2006 #37)
****
This report will let you search by specific business type code or for all business type codes. The report will print as of today's date; the customer number, the customer name, the full description of business type with the code and will specify if the client uses EDC Client Software. Total on last page.
****
CUSTOMERS: Customers who Receive Electronic Invoices (1/31/2006 #38)
****
This report will list all of your customers who are setup to receive electronic invoices as of the present date. You will see the customer key, the customer name and the e-mail address where the invoice is sent with a total of customers on last page.
****

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CUSTOMERS: Customers with Locked Account (1/31/2006 #39)
****
This report will list all of your customers who have a locked account. You will see the customer number and name
****
CUSTOMERS: Customer Holidays (1/31/2006 #40)
****
This report allows you to search by customer or for all customers and by date range or for all dates. You will see according to your search, the holiday date with the customer key it is associated to.
****
CUSTOMERS: Service Customers Only (1/31/2006 #41)
****
This report will list as of the present date all of your clients who are setup as only "service customers". You will see the customer key and name with a total at the end of report.
****
CUSTOMERS: Customers with File Validation set to YES (1/31/2006 #42)
****
This report will list all of your clients who have the file validation option set to YES in the customer information module. You will see as of the present date the customer key and name with a total at the end of report.
****
CUSTOMERS: List of Inactive Customers (1/31/2006 #43)
****
This report will list all of your customers who are set to NO in the field "Active" of the customer information module. You will see the customer key and the name with a total at the end of report.

****
INVENTORY: Box Inventory Report (2/2/2006 #44)
****
The report is, all boxes in inventory indexed by box number with the following fields:
Box Number, Description, Department, Type, Start Date, End Date, Destruction Type, Destruction Date, Activity, Entry Date, Box Volume
****
INVENTORY: File Inventory Report (2/2/2006 #45)
****
The report is, all files in inventory indexed by file number with the following fields:
File Number, Description, Department, Type, Start Date, End Date, Destruction Type, Destruction Date, Activity, Entry Date
****
PRODUCTIVITY: Return Errors (2/15/2006 #47)
****
This report will let you search by refile date between a date range for a specific employee number or all employees. You will see the location, the refile date, the refile time, the first and last name of the employee with the employee number and at last the reason why the error occurred.
****
INVENTORY: Box Listing by Location by Client (2/24/2006 #48)
****

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This report will allow you to search between location ranges. You will see the following information; customer number, customer name, customer box number, customer box RC number, the location for each box number and at last a grand total.

****
ORDERS: Orders Placed Via Server (WEB and Client software) (4/18/2006 #49)
****
This report will allow you to view all orders passed via the client software and the web server between a date ranges.
You will see the order number, the entry date, the customer key, if the order is from client software or web.
****
INVENTORY: Box Overdue Memo for a Recipient (4/18/2006 #50)
****
This memo lists all the overdue boxes and allows you to search by recipient inside a customer key as of the present date.
You will see the return date, the box number and description.

****
INVENTORY: File Overdue Memo for a Recipient (4/18/2006 #51)
****
This memo lists all the overdue files and allows you to search by recipient inside a customer key as of the present date.
You will see the return date, the file number and description.

****
CUSTOMERS: Customers who receive paper invoices (mail) (4/18/2006 #52)
****
This report will list as of the present date all of the customers who are set to receive paper invoices by mail.
The report is sorted by customer number, and will give you the full name of the customer with a grand total at the end
****
CUSTOMERS: Authorized Users by Customers (4/18/2006 #53)
****
This report is used for mailing purposes. It allows you to make mailing labels. You can filter the report for only active customer or all and by container type (box or tape)
This report will show you all the authorized users by customer name with the mailing address.
****
CUSTOMERS: Customer Contract Renewals (4/18/2006 #54)
****
This report will give you a list of customers by renewal date and includes the customer key and name, the mailing address, the authorized users, the date the client was created in EDC, the customer's renewal date, the hourly rate for labor and the minimum cost per month for storage. You can filter the report to be for only active clients or all and you have to select a renewal date range.
****
NATURAL VOLUME GROWTH: New Accessions (4/19/2006 #55)
****
This report will allow you to view all accession done in cubic foot during a given

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period. You can search by creation date or for all dates and even between date ranges.
The report lists the following columns; customer key, invoice #, accession price code, quantity of boxes entered (in C.F.) and the invoice date. At the end of report you will get a total of Cubic feet entered during the given period.

****
NATURAL VOLUME GROWTH: Confidential Destruction (4/19/2006 #56)
****
This report will allow you to view all confidential destruction done by cubic feet during a given period. You can search by destruction date or for all dates and even between date ranges.
The report lists the following columns; customer key, invoice #, confidential destruction price code, quantity of boxes destroyed (in C.F.) and the invoice date. At the end of report you will get a total in Cubic feet for the given period.
****
NATURAL VOLUME GROWTH: Non Confidential Destruction (4/19/2006 #57)
****
This report will allow you to view all non confidential destruction done by cubic feet during a given period. You can search by destruction date or for all dates and even between date ranges.
The report lists the following columns; customer key, invoice #, non confidential destruction price code, quantity of boxes destroyed (in C.F.) and the invoice date. At the end of report you will get a total in Cubic feet for the given period.
****
NATURAL VOLUME GROWTH: Deletions (4/19/2006 #58)
****
This report will allow you to view all deletions done by cubic feet during a given period. You can search by destruction date or for all dates and even between date ranges.
The report lists the following columns; customer key, invoice #, deletions price code, quantity of boxes/files destroyed (in C.F.) and the invoice date. At the end of report you will get a total in Cubic feet for the given period.

****
NATURAL VOLUME GROWTH: New customers added during given period (4/19/2006 #59)
****
This report allows you to view all customers added in EDC during a given period. You can search by range of creation date or for all creation dates.
You will see the following information; customer key, customer name, creation date and a grand total at the end of report.

****
NATURAL VOLUME GROWTH: transfers (4/19/2006 #60)
****
This report will allow you to view all transfers done by cubic feet during a given period. You can search by transfer date or for all dates and even between date ranges.
The report lists the following columns; customer key, invoice #, transfer price code, quantity of boxes transferred (in C.F.) and the invoice date.

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At the end of report you will get a total in Cubic feet for the given period.

****
SHREDDING: Customer Bin Allocation (4/27/2006 #61)
****
Report that displays for each customer, for each type of shredding container, the number of containers that is allocated to the client.
****
INVENTORY: Files Containing Images by Customer (7/24/2007 #83)
****
This report can be used to search for files that have images.
The report shows how many images per file and the total size of those images in bytes.
You can search for any number of customers or all customers.

****
INVENTORY: Files Containing Images by Customer (7/24/2007 #84)
****
This report can be used to search for files that have images.
The report shows how many images per file and the total size of those images in bytes.
You can search for any number of customers or all customers.

****
ACCOUNTING: Resultant Customer Pricing (7/20/2006 #66)
****
In EDC, a customer's pricing schedule depends on prices defined in the Customer Pricing module. If a price code isn't defined there, the General Pricing module defines the price.
The following report appropriately merges pricing information from these modules and lists details on each price code for each customer.
This report may be used to produce a report for one customer or all customers.
Expect an average of one minute per customer for the generation of this report.
To define what customers to list, go to the Data tab of the SQL Report module, and click on the SQL button from the dataset's toolbar. (The SQL button looks like the Wordpad-icon).

If present, remove the lines that start with //, keeping

Customer.custkey='[Custkey]', replacing [Custkey] with the appropriate customer key.

If you wish to include all customers, replace this line with
Customer.custkey<>"

This report only works with Pervasive SQL 9 and above.
****
SYSTEM ADMINISTRATION: Current box count (7/24/2006 #67)
****
This report will show how many boxes are being billed for rent, which is the same number that is used to determine if your EDC RC license has been surpassed (that is, if you are licensed by box count).
****

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ORDERS: Recipient barcodes (9/14/2006 #71)
****
This report will print several recipient barcodes per page based on the recipients listed in the Recipient module of EDC Client. This is useful when using the Client PDT to check-out items to a recipient or to update which recipient has an item checked-out. Two layouts are available.
****
CUSTOMERS: Mailling labels (11/8/2006 #72)
****
This report will give you a complete list of mailing labels for all your customer which you can sort in different ways.
****
INVENTORY: Boxes and Files with Notes (12/1/2006 #76)
****
This report will show boxes, their notes, and contained files with their notes as well. There is as well the ability to search within a range of box numbers using the search utility.
****
INVENTORY: Shredding Bin inventory at customer (2/27/2007 #77)
****
This report is a listing of all the shredding bins that a customer has at his location.
The report has the following information:
1- EDC Customer Key
2- Shredding Bin Description
3- Shredding Bin quantity at the customer's place.
The report can be filtered to include all customers or only a few.
****
INVENTORY: Wild Card Search on Field 1 (3/22/2007 #79)
****
Report allows a wildcard search inside field 1 for 1 client or all client.

****
MANAGEMENT: Employee ID Cards (4/25/2007 #80)
****
This report let's you print ID cards with barcodes for your employees. That card is mainly used to login the employee into the PDT.
****
ORDERS: Files in transit locations (8/13/2009 #99)
****
This reports allows you to list all files in a range of transit locations or display the transit location where a file is located. When performing the latter search you can search by file number, file description or file rc number.
****
ACCOUNTING: Newly Added Files by Date Range (6/14/2007 #82)
****
This report displays a count of all new files entered (with the exception of PreAdd files) in EDC RC for a specified date range. It will display the delivery n umber on which the file was auto-inventoried or the delivery number on which the file was first received at the record center. If the file was inventoried (in the IN state) directly in the File module the delivery number will be left blank.
Here is the field layout of the report:
Delivery No. Customer Count

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****
INVENTORY: Disposal List (3/27/2008 #89)
****
This is a replacement for the disposal list report. It prints in landscape orientation and on letter paper. The font size is larger than the standard disposal list report from the Disposal List module.

This report can only be used with an existing disposal list. Furthermore, if you want the list status to be LOCKED you will first need to print the disposal list for authorization from the disposal list module.

****
INVENTORY: Box Count (In and Out only) with storage price code for all customers (2/4/2008 #87)
****
This report lists counts of in and out boxes for each customer with their associated storage price code (ENTR) taken from the customer pricing module. At the end of the report you also see the total box count and storage amount for the whole record center.

****
IMAGING: Seperator Pages (3/7/2008 #88)
****
This report allows you to print imaging seperator pages that can be used to perform batch scanning from a third party scanning software. You can then import the results of the volume scan in EDC.
This is an alternative to using the separator pages that can be printed in the File module of EDC.
This seperator page includes many data fields so that you can easily locate the file you wish to scan. You can print the seperator pages using several search criteria (customer key, box no., file no range, file rc no range and entry date range).
This seperator page has been optimized for use with DocScan Pro OCR (http://www.docscanpro.com/index.htm). See Knowledge base article KB00145 for more information.

****
SYSTEM ADMINISTRATION: Customers with incomplete full text indexing (8/5/2008 #90)
****
This reports all customers which have a backlog in the background full text indexing.

****
LABELS: Generic Barcodes on 2x4 Labels (8/12/2008 #92)
****
This report will allow you to print generic barcodes on 2x4 inches labels.
To use the report simply change the value of the barcode to be the text you desire from the design tab. When printing you will need to select your barcode printer.

****
LABELS: Generic Barcodes on 2x4 Labels (8/12/2008 #93)

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****
This report will allow you to print generic barcodes on 2x4 inches labels.
To use the report simply change the value of the barcode to be the text you desire from the design tab. When printing you will need to select your barcode printer.

****
ACCOUNTING: MYOB Customer Export (8/13/2008 #94)
****
This report allows you to export customer information from EDC so that you can import this into MYOB.
You will need to preview the report and specify a customer creation date. The report will include all customers created after that date. To produce the report, click the print button and then choose to export as an excel file. You will then simply import this file into MYOB.

****
ACCOUNTING: MYOB Invoice Export (8/13/2008 #95)
****
This report allows you to export invoice information from EDC so that you can import this into MYOB.
Here are the steps you need to follow:
=- Preview the report and specify a range of invoice numbers.
=- Produce the report by clicking the print button and then choose to export as an excel file.
=- Open the report and export it to Excel.
=- Open the report and save as CSV.
=- Import from MYOB by importing sales transactions and matching up the fields.
(This report is replaced by #103)

****
INVENTORY: Box History Export (8/25/2008 #96)
****
Simple report that lists all box histories. Generally used to export history information.
In the Preview, you will need to change the value of the CustNo field, to the internal customer number found in the customer table.
This is required so that the report is fast and uses the indices in the history table.
The activity constants are:
actIn = 1; { file or box currently In }
actOut = 2; { file or box currently Out }
actSelected = 3; { file or box selected for order entry }
actReserved2 = 4; { reserved for future usage }
actPreAdd = 5; { file or box is in Pre Add }
actOnDispList = 8; { file or box is on a disposal list }
actOnTransList = 9; { file or box is on a transfer list }
actOnDelList = 10; { file or box is on a deletion list }
actDeleted = 11; { box or file deleted (removed from active inventory) }
actDestroyed = 12; { box of file destroyed (shredded) and removed from active inventory }
actTransfered = 13; { box or file transfered to other location or company and removed

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```
actIn_InHouse            = 14; { file or box in, at the clients in-house
facilities }
actOut_InHouse           = 15; { file or box out, at the clients in-house
facilities }
actDestroyed_InHouse     = 27; { file or box destroyed in house }
actPrinted_InHouse       = 32; { file label has been pre-printed on client side }
actSampled               = 35; { box or file Sampled (removed from active
inventory) }
actRevised               = 36; { box or file Revised (removed from active
inventory) }
actSentToDepot           = 37; { box or file Sent to Depot (removed from active
inventory) }
actMoved                 = 6;  { file or box was moved }
actSearched              = 7;  { file or box was searched }
actDeptChange            = 16; { department of box or file has changed.}
actNumberChange          = 17; { box or file number has changed. }
actDescChange            = 18; { box or file description has changed. }
actTypeChange            = 19; { box or file type has changed. }
actAccessLevelChange     = 20; { box or file access level has changed.}
actDispositionChange     = 21; { box or file disposition changed (date or
disposition type) }
actVolumeChange          = 22; { box volume change }
actBoxChange             = 23; { cardboard box change. For boxes only.}
actPreAddDeletion        = 24; { "invisible" history added when a pre add
box/file is deleted at a
actImagesScanned         = 25; { images have been scanned within a file}
actOnInternalTxList      = 26; { box is being moved to a new location }
actVaultTransition       = 28; { box InVault field has changed. }
actPicked
actRefiled               = 30; { box or file has been refiled }
actUserField6Change      = 31; { box user field 6 has changed }
actGeneralChange         = 33; { some other field changed }
actChangeOfHands         = 34; { When recipient changes. }
actOnInternalTxList      = 38; { box or file Item set has changed. }
actAdded                 = 39; { First time a box is added at the record center }

*********************************************
## INVENTORY: File History Export ( 8/25/2008 #97 )
*********************************************
Simple report that lists all file histories. Generally used to export history
information.
In the Preview, you will need to change the value of the CustNo field, to the
internal customer number found in the customer table.
This is required so that the report is fast and uses the indices in the history
table.
The activity constants are:
actIn                    = 1;  { file or box currently In }
actOut                   = 2;  { file or box currently Out }
actSelected              = 3;  { file or box selected for order entry }
actReserved2             = 4;  { reserved for future usage }
actPreAdd                = 5;  { file or box is in Pre Add }
actOnDispList            = 8;  { file or box is on a disposal list }
actOnTransList           = 9;  { file or box is on a transfer list }
```

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actOnDelList = 10; { file or box is on a deletion list }
actDeleted = 11; { box or file deleted (removed from active inventory) }
actDestroyed = 12; { box of file destroyed (shredded) and removed from active inventory }
actTransfered = 13; { box or file transfered to other location or company and removed
actIn_InHouse = 14; { file or box in, at the clients in-house facilities }
actOut_InHouse = 15; { file or box out, at the clients in-house facilities }
actDestroyed_InHouse = 27; { file or box destroyed in house }
actPrinted_InHouse = 32; { file label has been pre-printed on client side }
actSampled = 35; { box or file Sampled (removed from active inventory) }
actRevised = 36; { box or file Revised (removed from active inventory) }
actSentToDepot = 37; { box or file Sent to Depot (removed from active inventory) }
actMoved = 6; { file or box was moved }
actSearched = 7; { file or box was searched }
actDeptChange = 16; { department of box or file has changed.}
actNumberChange = 17; { box or file number has changed. }
actDescChange = 18; { box or file description has changed. }
actTypeChange = 19; { box or file type has changed. }
actAccessLevelChange = 20; { box or file access level has changed.}
actDispositionChange = 21; { box or file disposition changed (date or disposition type) }
actVolumeChange = 22; { box volume change }
actBoxChange = 23; { cardboard box change. For boxes only.}
actPreAddDeletion = 24; { "invisible" history added when a pre add box/file is deleted at a
actImagesScanned = 25; { images have been scanned within a file}
actOnInternalTxList = 26; { box is being movedto a new location }
actVaultTransition = 28; { box InVault field has changed. }
actPicked
actRefiled = 30; { box or file has been refiled }
actUserField6Change = 31; { box user field 6 has changed }
actGeneralChange = 33; { some other field changed }
actChangeOfHands = 34; { When recipient changes. }
actOnInternalTxList = 38; { box or file Item set has changed. }
actAdded = 39; { First time a box is added at the record center }

****
INVENTORY: Destruction Certificate (1/27/2009 #98)
****
This report allows you to print destruction certificates from EDC RC.
It will only print for destruction lists that have a value for the destruction date. You can print muliple certificates at a time. The selection criteria are customer key, customer list number or greater than a spedified destroy date (as dispalyed in the destroy date of the Disposal List module).
You will need to edit the design of the report to change your record center logo and the name of the operations manager.

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****
Current Rush Orders (10/27/2009 #101)
****
This report tells you if there are any rush orders at the moment and if so, at what state they are. Possible states are:
=- Created
=- Paged
=- Being Picked
If the report shows nothing or is blank it is because there is no rush orders unattended in the system at the moment.

****
ACCOUNTING: MYOB Invoice Export (11/24/2009 #103)
****
This report allows you to export invoice information from EDC so that you can import this into MYOB.
Here are the steps you need to follow:
=- Preview the report and specify a range of invoice numbers.
=- Produce the report by clicking the print button and then choose to export as a text file (.csv)
=- Import from MYOB by importing sales transactions and matching up the fields.
(This report replaces #95)

11 Glossary

11.1 Definitions

Access level
Setting an access level greater than 0 on a box or file limits access to that file to users with a greater or equal access level assigned in their authorized user profile.

Alternate bar code
A bar code generated by an external system but linked in EDC to the box, file, or location, so that it can still be recognized.

Auto Inventoried file
Files created during the order process will become permanent if they are found. If they are not found, the record of the file is keep in the deleted order items[670] module rather than in the inventory. Depending on the customers settings[258], a search charge may be automatically applied instead of a picking fee.

Box Bar Code
Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by a bar code scanner, for data entry and tracking purposes.

1Q 838 6343

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Interpretation of a box bar code:

1 : Box code (2 = file, 8 = file out card, 11 = location...)
Q: Check digit (A letter calculated based on the sum of the values of the other characters, validates that the entire bar code was read.)
838 : Customer System Number[249] (which can be seen in the Customer Information module)
6343 : Box RC number[871] (which can be seen in the Box module)

* See also Tape Bar Code

Customer key (company key)
Unique series of numbers and letters which identify an organization within EDC.

Conservation policy
Determines if the boxes' or files' disposal dates are calculated from their related department or document type. The most common policy is to compute the disposal date by document type.

CSV
Abbreviation meaning Coma Separated Value. This file format is used as a representation of a database. Each line is one entry or record; the fields in the record are separated by commas. This format is often used to import data.

Deletion list (cancellation of space)
List of OUT semi-active boxes and files which are to be no longer considered part of the record center's inventory (effectively canceling the space for billing purposes).

Delivery types
The different delivery services offered by your off site record center.

Disposal list
List of boxes which includes all documents with an expired disposal date. The destruction of the articles present on the list must be confirmed before the operation can be executed. The disposal mode of the document's type will establish in what manner the boxes will be disposed of.

Disposal
Action that will be applied to a document at the end of its retention period.

Disposal, CONFIDENTIAL
Documents of this mode will be disposed of in a confidential manner.

Disposal, mode of
Manner with which a document will be disposed of. The disposal modes are controlled by the record series.

Disposal, NON CONFIDENTIAL
Documents of this mode will not be disposed of in a confidential manner.

Disposal, NONE
You have not yet determined a disposal mode.

Disposal, PERMANENT

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Documents of this mode will not be disposed of.

Disposal, REVISION
Documents of this mode will be placed on a list so that they can go through a special verification before being disposed of.

Disposal, SAMPLE
Documents of this mode will be placed on a list so that it will be possible to extract samples and dispose of the remaining items.

Disposal, SEND TO DEPOT
Two possibilities :
1. The active documents of this mode will be transformed into semi-active documents and sent to your storage facility.
2. Semi-active documents of this mode will generally be sent to your permanent archiving facility.

Document, active
Usually, this is a document that is being accessed frequently. Active documents are generally kept within an organization's storage facility, not at an off site records center.

Document, semi-active
A document that is not being accessed frequently. Hence, it is cost efficient to conserve semi-active documents at an off site record center.

Fields
Reserved zone of an entry form that can contain a specific information, like an entry date or a box description.

Fields, alphanumeric and numeric
The most common. Simply type in the required information in the field. A numeric field can contain only numbers, while an alphanumeric field can contain both numbers and letters.

Fields, choice field
Only a limited set of choices may be entered in the field. Press the space bar or click at the right of the field to select the next possible value.

Fields, drop down
These fields are like numeric and alphanumeric fields, but only values located in a list can be entered in the field. You have access to a pop-up list of the valid values by clicking a button located at the right of the field.

Fields, optional
Field that can remain empty.

Fields, required
Field that must be filled in. An entry form can only be confirmed if all required fields are not blank. Required fields frequently appear in red.

Fields, unique
Field on an entry form which cannot have duplicate values. For example, the system will not permit the addition of a new box that has the same number as a box already in the inventory (this is only by

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customer.)

File Bar Code

2L 838 3124

Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by an automated reader. Your record center identifies every file with a bar code label to ensure accuracy when files enter and leave the off-site record center.

Legend

2 : File code
L: Check digit (could be any other letter)
838 : Customer System Number[249] (which can be seen in the Customer Information module)
3214 : File RC number[871] (which can be seen in the File module)

History

History of the activities of a box or file.

Holding location

A holding location is usually a temporary location where the boxes wait until they are put in their final locations. It is different from a transit location in the fact that the boxes have been assigned a size (this is used to start charging the storage of a box as soon as it is added to the inventory.)

Index

Fields by which a list or report will be sorted, scanned or searched.

Item set

Drop-down field associated to a list defined in the Box and the File module.
This field allows to associate an item to an item set. When one item associated to an item set is ordered, all the available items associated to that set are automatically ordered by the system.
To associate an item to an item set, simply select an item set in the drop-down list or add a new set manually by entering a description.

Location Bar Code

11C VH-9-0104-45

Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by an automated reader. Your record center identifies each location with a bar code label to ensure accuracy when files and boxes are checked in and out of their respective locations.

Legend

11 : Location code
C: Check digit (could be any other letter)
VH-9-0104-45 : Location (which corresponds to the location mask specified in the System Information module)

** See also the Location mask[371] topic for more details

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Mask
When a field has a mask, you must enter the information according to the criteria defined by the mask. Most masks are defined in the Customer Information module.

Mask criteria
Regular mask
- "X" any character
- "!" any character, forced to upper case
- "L" any character, forced to lower case
- "x" any character, first letter of a word forced to upper case
- "a" alphas and "-" and "," and "."
- "A" alphas and "-" and "," and ".", forced to upper case
- "l" alphas and "-" and "," and ".", forced to lower case
- "1" numbers only, no spaces
- "9" numbers and spaces only
- "i" numbers and spaces and "-"
- "#" numbers and spaces and "-" and "."

Example : A field with the mask "999" will accept the following values (of three characters): "345", " 84" and "0 0". It will not accept the following values: "4-6", "4.6", "4,6", "ert", "er4" and "E-4"

Date mask

Value	Result
"mm/dd/yyyy"	"01/09/1998"
"yyyy/mm/dd"	"1998/01/09"

Menu
List of words, generally located on the top of the screen, that gives access to menu items. A menu item may either execute an operation or open another menu, called a sub-menu.

Menu item
Choice of operations offered within a menu. The menu item may either execute an operation, or open a new sub menu with its own menu items. See also "menu".

Module
EDC is composed of multiple modules accessible from the Main Window of the system. Each module is responsible for a specific set of operations. For example, the Box module is used to add, edit, print, and search for boxes.

Non-track file
These are files that have not been inventoried on the computer system. You may still order non-track files, but the system will record only the description of the file when it is ordered. Therefore the tracking on non-track files is limited, but it is still possible to order at a file level.

OCR
Optical Character Recognition. A technology that lets one convert an imaged document to editable text.

Online help
Information on the software that is available within the software itself. Pressing F1 will display a help screen on the current operation in a module.

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Password

Combination of letters, numbers, or other characters used to confirm the identity of a company or user. Passwords must be kept secret at all times to ensure confidentiality. It is also recommended to change passwords on a regular basis.

PDT

PDT is the abbreviation for Portable Data Terminal (bar code reader). This abbreviation will be used through the manual to describe all the portable bar code readers supported by EDC (PHL 2700 and PDT 3100).

PDT 3100
Portable data terminal manufactured by Symbol.
Features:
- Memory: Up to 7.6 MB for data and/or program storage
- Weight: 440 to 480 g - with battery and laser module
- Keypad: 21-key hard key cap ; 35-key or 46-key conductive rubber. Side alpha-shift key and scan trigger.
- Drop Test: 4 feet from concrete
- Dimensions: 1.9 x 3 x 9.38 in.
- Warranty : approximately a year after date of purchase
- Operating time: approximately 8 hours
- Back light option
- Supports portable printer (O'Neil model)

PHL 2700-80
Portable laser data collection terminal manufactured by Opticon.
Features:
- Memory: 8MB data RAM
- Weight: 177 g - excluding batteries
- Keypad: 27 keys total (26 keys user definable)
- Drop Test: 4 feet to concrete floor; 10 drops (all sides)
- Dimensions: 7 x 2.5 x 1.6 in.
- Scan Rate: 100 scans/sec.
- Warranty : 1 year from date of purchase
- Protects data for up to 30 days
- Operating time: approximately 40 hours
- Supports portable printer (O'Neil model)

RC number

RC is shorthand for Record Center. Every box and file is identified with a unique numerical RC number. This number is used with bar code labels to ensure accuracy when the boxes and files are manipulated internally by the system.

*Reactivation

You can remove a semi-active document from the record center by deleting it. The information of the document in question is not erased from the database, it is only marked as deleted. You can return a previously deleted document to your record center by reactivating it, doing this will also reactivate its past history. See also the topic

Recipient

Person to whom an order is addressed. The authorized user is different from the recipient, because he is the one having access to EDC and can order for several recipients.

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Record
All fields of a specific item such as, for example, the information of box "231".

Record centre, off site
Storage facility where your less active (semi-active) documents are stored. A record center allows you to preserve your office space for more frequently used documents.

Replication
Replication is the process of synchronizing the data between a record center and its customers. The EDC Replicator (located at an EDC ActiveFile site) controls the replication requests. The schedule of the requests can be customized from within the program. Once the replication request has been initiated, a program called EDC Requester (located at an EDC ActiveFile site) encrypts and transfers the data to the record center. It will also perform the opposite operation when an answer is received from the record center : it will receive the data and decrypt it. All the replication requests are initiated from the client, the record center will never, under any circumstances, initiate a link with its clients. The communication is done through a TCP/IP link using the Internet. The record center must be running an EDC Replication Server process in order to accept the remote client requests. An EDC Replication Server process does not need to be installed if the record center does not have any customers using EDC ActiveFile or ActiveWeb.

Restrictions
Conditions you define that prevent the disposal of documents containing the restriction. Restrictions are associated to record series and are used to ensure the conservation of certain documents beyond their normal retention period.

Retention period
Period for which documents must be conserved for either legal, fiscal or company policy reasons.

Retention schedule
Collection of record series controlling the disposal of boxes and files. Types define the retention period and the disposal mode of documents.

Retention, active
Retention period of a document within an organization's storage facility. This period is defined from the time a document is created in the system to the time the document is transferred to semi-active storage at an off site center.

Retention, semi-active
Retention period of a document within an off site record center. This period is defined from the time a document enters an off site record center to the time the document is disposed of. See also "conservation policy".

*Session, suspended
After a computer failure, an active session at that time will remain active even if it is not anymore. You should terminate any suspended session after making sure that the session is really inactive. When all your user licenses are used up by suspended sessions (preventing you from having access to EDC), you can use the Access Management program to terminate all suspended sessions. See list of related applications.

Shortcut, keyboard

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Combination of one or more keys on the computer keyboard to be pressed simultaneously. Also known as hot keys, they enable you to perform operations more efficiently without having to use the menu or the mouse.

Signing officer
Person with the authority to approve the destruction lists.

Sorting
When viewing a listing indexed by box numbers, the numbers will be sorted like a dictionary. Here is a sample list of sorted box numbers: 00001, 00002, 03, 09, 10, 100, 11, 20, 9, A-001, B-002, a-001, b-001. It is important to note that the box number 100 is before the number 11 and that all uppercase letters appear before lowercase letters. If your box numbering system is strictly numerical, then it is important to left pad with "0"s your numbers like 000001, 000002, 000022, ...

SQL Statement
A complete phrase in SQL that begins with a keyword; it describes an action to be taken in the tables 874 selected in the statement.

State, DELETED
The item has been deleted (which implies that the space for the item is canceled, and will not be billed for). Boxes are generally deleted because they will not be returning to the off site center.

Note that deleted semi-active items are not deleted from the computer system; they are only marked as "DELETED", it is therefore possible to recover the history of deleted items by reactivating them.

State, DESTROYED
The item has been destroyed.

State, IN
The item is at the record center and is available for ordering.

State, IN (IN-HOUSE)
The item is present within your in-house inventory (active documents) and is available for ordering.

State, ON DELETION
The item is on a deletion (cancellation of space) list. After the item is processed, its state will change to "DELETED".

State, ON DESTRUCTION
The item is on a destruction list at your record center. After destruction of the item, its state will change to "DESTROYED".

State, ON TRANSFER
The item is on a transfer list. After the transfer, its state will change to "TRANSFERRED".

State, OUT
The item has been ordered from the record center and has not been returned.

State, PRE ADD
The item has been entered in the computer's inventory, but the item has not been received at the off site record center. The rent charges for items in PRE ADD are not billed. Once the items arrive at the off site

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center, their state is changed to "IN", and rent charges begin to take effect.

State, SELECTED
The item is currently selected for an order, but has not yet been shipped.

State, TRANSFERRED
The item has been transferred to another storage center.

*Table
A table is the basic unit of storage in a database management system. It represents entities and relationships, and consists of one or more units of information (rows), each of which contains the same kinds of values (columns). Each column is given a column name, a data type, and a width. The values found in the tables are the values found in the software.

Tape Bar Code

Series of printed vertical bars arranged in a pattern that represents meaningful characters, which may be read by an automated reader. Your record center identifies every tape with a bar code label to ensure accuracy when tapes enter and leave the off-site record center.

This type of bar code is a base 36, which means that 1 is 1 but 10 would become A. Example, the following bar code '1 13 10' would become '1 D A' if it were a tape. This type of coding is used so that the tape bar code sizes are minimized as much as possible.

Transfer list
List of boxes which are to be transferred from an off-site record center to another location.

12 Questions

The following questions are frequently asked:

How do I reboot the scanner?875
How to I use a custom invoice layout?710
How do I bill multiple accounts on a single invoice?876
How do I add a periodic charge with a defined end date?877

12.1 How do I modify a saved image?

Once an image is saved in EDC RC, you may append more images to the end of it, but it is otherwise considered permanent. If you need to modify it, the general method is to 1) export the image, 2) modify it in a third-party software, 3) remove the original image, and then 4) import the modified image as if it were a new image. (Please note that if the image had OCR done or document indexes assigned, you will need to repeat these steps.)

Steps:
Open the imaging module for the correct file

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1. In the **Inventory->File** module, navigate to the file that you wish to modify.
2. From the menu, select **File->Images (Ctrl-I)**.

Export the image
- From the menu, select **File->Export**.
- Click **Okay** to export the entire page range.
- Select a location and name for saving the image. (e.g. 'Temporary image file.tif'), and click **Okay**.

Check if the image has any key words or document indexes
- To view any keywords, from the menu, select **View->Key words**. .
- To view document indexes, from the menu select **Edit->Documents**.

If either of these are present, take note of them so that you can add them to the re-imported images.

Modify the images in your favorite image processing software.

Remove the images from the file
- Close the Imaging module
- Note the *Customer key* and *RC number* of the file that you are working with.
- From the menu of the **Maintenance->Box and file maintenance** module, select **Edit->Delete all images in a file**.
- Click **Yes** to confirm that you understand that the images will be deleted.
- Enter the *Customer key* and click **OK**.
- Enter the *File RC* number and click **OK**.
- Review the message that appears to ensure that you are deleting the correct images, then select the **check box** and click **Yes**.
- Enter your password and click **OK**..
- The images will be deleted.

Import the modified images
1. In the **Inventory->File** module, navigate to the file that you wish to modify.
2. From the menu, select **File->Images (Ctrl-I)**.
3. From the menu of the imaging module, select **File->Import**.
4. Select the image file to import and click **OK**.

Do any post-import modifications

(Perform these steps according to your standard practices)
- To run OCR, from the menu select **File->OCR | OCR and index**.
- To edit keywords, from the menu, select **View->Key words**. .
- To edit document indexes, from the menu select **Edit->Documents**.

12.2 How do I reboot the scanner?

Under some circumstances you may wish to clear the information on the scanner. You may do so as follows:

1. Check if there are any lists that you wish to keep, and if so, upload these to the computer before proceeding
2. Power off the scanner by pressing the orange **pwr** button

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3. Hold **0**,**7** and press "**pwr**" to enter the system menu
4. Press '**2**' to restart

The lists and various settings will be cleared.

5. Power on the scanner by pressing the orange **pwr** button
6. Scan your employee bar code to log in

If you transfer information using a cable instead of the cradle,

7. Press **4** to enter the utilities menu
8. Press **8** for Cradle/Cable
9. Press **2** for Cable

If you use alternate labels of the same length for locations and items

10. Press **4** to enter the utilities menu
11. Press **6** for Check bar code length
12. Press **0** for No

If you wish to use the PDT before downloading a list from the computer, configure the PDT as follows:

13. Open the **Management->System Information** module.
14. From the menu, select **File->Configure PDT**.
15. Set the PDT to receive by placing it in the cradle or connecting the cable and pressing **1** to receive.
16. Press **Enter** on the computer to send the configuration information to the PDT.

12.3 How do I bill multiple accounts on a single invoice?

Billing multiple accounts on a single invoice requires following steps:

For each account to be added to the main account invoice:

1. In the **Customer->Customer Information** module, navigate to the correct account.
2. Press **Ctrl-E** to go into **Edit** mode.
3. Near the top of the billing section, select the **Bill to another client** setting, and enter the customer key of the main account.

For the main account:

1. In the **Customer->Customer Information** module, navigate to the correct account.
2. From the menu, select Edit->Invoice template
3. When prompted for an invoice to use, click **Cancel**.
4. Review the invoice template that appears. If necessary, edit it[710]. If charges need to be grouped by department or account, ensure that the **Report->Sort by Department** option from the menu is selected. When done, exit the editor, saving changes if you made any.
5. Press **Ctrl-E** to go into **Edit** mode.
6. Near the bottom of the billing section, ensure that **Legacy invoice** is set to **No**.

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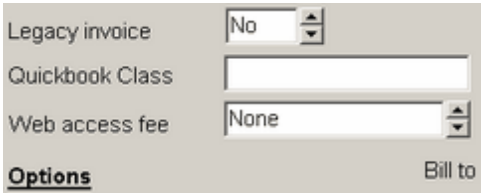

7. Now when you do invoicing, invoices will not be created for the sub-accounts. The main invoice will be created with all of their charges included.

12.4 How do I add a periodic charge with a defined end date?

The Orders->Recurring Orders module allows you to create complex schedules for creating orders for shredding service, line items, and returns.
If the recurring order contains only line items that are not pickable, it will lead to the creation of a delivery that will be automatically closed and verified. The line-items on these deliveries will automatically be included on the service invoice for the invoice that includes the corresponding service dates.

To add a periodic charge with a defined end date:

1. In the **Accounting->General Pricing**[734] and **Accounting->Customer Pricing**[743] modules, ensure that the price code for the charge exists and is correctly configured.
2. In the **Orders->Recurring Orders**[681] module, add a new record by pressing the **Insert** key on your keyboard or clicking the green "+" button on the button bar.
3. When prompted, select the customer by typing the **Customer Key** for the account, and press **Enter**.
4. Give the recurring order a **description**, for reference purposes. (e.g.: "PERIODIC CHARGE: MONTHLY TO 2011-12-31")
5. Select a **Delivery address**. The one you chose isn't very important, except that it should be an active delivery address that is accessible by the user that you will select in the next step.
6. Select **User** for the order. (This user should have access to the delivery type and the delivery address used. I like adding an "RC ACCESS" user with full access to all accounts for this purpose.)
7. Click the **Schedule button** to define the schedule for the charge. (E.g. N th specific weekday of the month, Second Monday, End Date: 2012-12-31)

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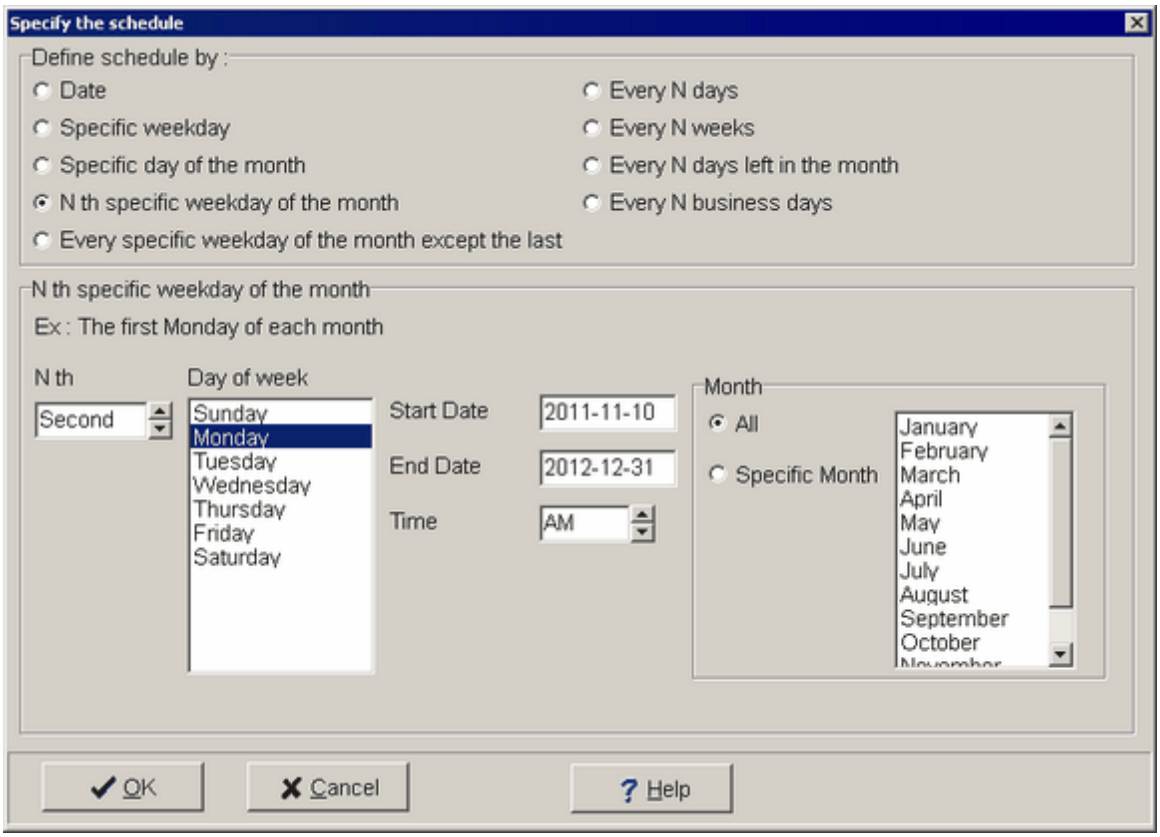

8. Set the **Holiday** setting to "Delivery After", in case the delivery lands on a holiday.
9. In the Items section, click the "**+ Add**" button.
10. From the menu that appears, select "**Line item**".
11. Select the desired line item from the list and click "**Okay**".
12. Adjust the quantity of the item if necessary, and click "**Okay**". You may also have to specify a department or charge back code, depending on how the customer is billed.

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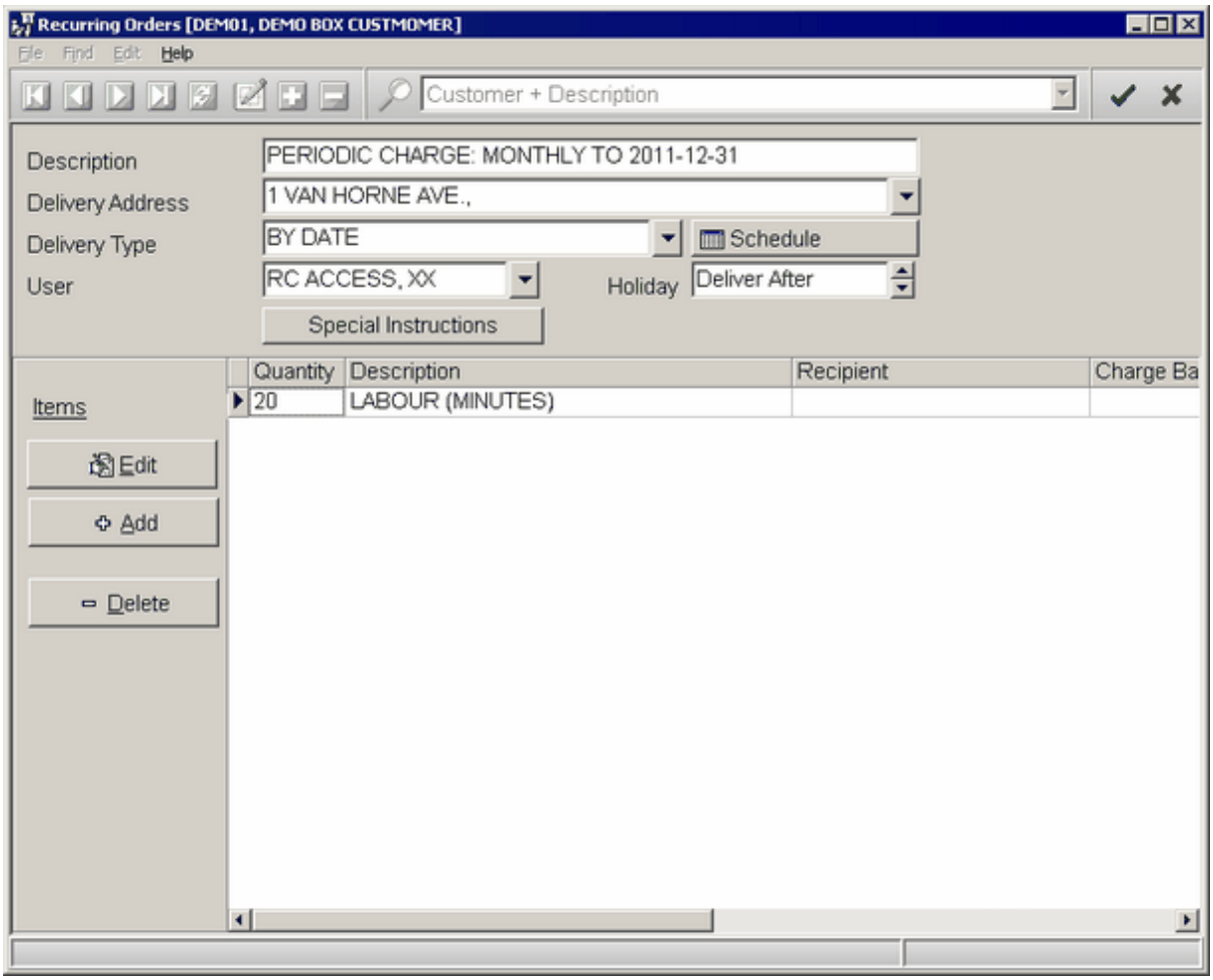

13.Press **Ctrl-Enter**, or click the green check mark when done.

12.5 File handling questions

What do I do if a client pulls a file from a box while doing a box consultation?

The service that you have provided to the client is pulling and returning the box. You have not handled the file, therefore there is no file-related services to bill.

If the client will want to return the file to the same position in the box, then you can advise them to insert a piece of paper similar to an out card or a sticky note where the file was pulled from.

If the client later wants you to pick up the file from them, then it would be treated as a new file addition or an interfile.

Will clients mind if I put labels on files when they are ordered?

Record centers that switch to EDCRC sometimes express initial concern that clients have information on their file folders and they may not like labels being placed on files for tracking purposes.

In this case, the best thing to do is to:

- Discuss the topic with the client.

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- Show them the file picking label and explain the advantages.
- Inform them that you will try to avoid covering information when attaching the labels.

Almost all clients will see the advantages and appreciate the improved service, especially since the file tracking labels make it much easier for the client to send the files back to you for refiling.

13 Advanced problem-solving

13.1 Items scanned to a location but not scanned in at the record center

Following conversion from another system, a busy record center may receive the error message that the item is not available, and it might not be practical for them to re-scan all the items that have been put away.

Warning: The following recipe works if the bar code of the item matches the box number, which is often the case with recently-converted data. If this is not the case then additional processing with be necessary.

1. Obtain the error message in a text document. (You can save the error message that appears on upload, or retrieve this through Orders->Delivery Maintenance,

Bring the items that were not scanned in on the correct delivery

2. If the status of the delivery is Returned or Verified, re-open the delivery for return.
3. In **Orders->Return Delivery**, select **File->Return Delivery** from the menu and enter the delivery number.
4. Copy and paste in the bar codes of the items from the error message.
5. Complete the delivery when done, in the usual way.

Update the location of the items

6. Open the **Inventory->Box** module.
7. Navigate to the correct box record by pressing **F8** to search by bar code, and cutting and pasting in the box number from the text file.
8. Press **Ctrl-E** to edit the record.
9. Cut and paste the proper location into the Location field.
10. Save the record, e.g. by pressing Ctrl-Enter.
11. Repeat for the remaining boxes.

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